Web PO Requisition
for Sage 200

User Guide
Web PO Requisition for Sage 200

Create Purchase Requisitions for Sage 200 via a web interface

- Multiple concurrent users entering requisitions in real time
- Submit requisitions with multiple authorisation rules
- View and print existing purchase requisitions
- Check live stock and supplier information from Sage 200 remotely
- Receive stock against existing purchase orders via the web
- Powerful account/stock search based on multiple fields
- Report on purchase requisitions from within Sage 200
- Works on multi-company installations
- Can be designed to reflect customers own branding

EUREKA ADDONS
Developing Sage for Growing Businesses

t 01355 581 960
e development@eurekasolutions.co.uk
www.eurekaaddons.co.uk

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Web PO Requisition for Sage 200 – User Guide

Introduction

Web PO Requisition for Sage 200 enables users to create purchase requisitions for goods/services required via a simple web interface. These requisitions can be submitted for approval and once authorised are converted automatically to purchase orders in Sage 200 without the need for any synchronisation, using Eureka Solutions' own web service for Sage 200. The module only requires a single Sage 200 web user licence and as a result it is ideal for companies that have many users who enter and authorise purchase requisitions but don't need access to other areas of the Sage 200 system.

Some of the main features of the module are outlined below:

Enter Purchase Requisitions via a Website

- Fast simple entry and authorisation of purchase requisitions via an easy to use web interface
- Mimics Sage 200 order entry functionality so minimal additional training required
- Allows entry of stock, free text items, comment lines, and additional charges
- When requisitions are authorised, the corresponding purchase order appears in Sage 200 in real time – no need to wait for orders to be synchronised. Purchase orders then go into the standard Sage 200 authorisation process
- Can be accessed anytime, anywhere via any device that is connected to the Internet

Purchase Requisition Approvals

- Purchase requisitions created through the web can then be authorised by managers through the same interface.
- Authorisation can be set up to use single tier, multi-tier or project manager approval depending on your requirements

View Supplier and Stock Details through the Website

- Users can view supplier contact information on the website or via an iPad
- View live stock item details and balances in real time via a web interface
- Fast and powerful search functionality that searches on multiple fields

Receive POs Raised from Requisitions

- Once the requisition has been authorised and the PO has been created in Sage 200, users can then receive goods against the PO via the same web interface, immediately updating stock levels in Sage 200.

Multi-Company Access

- Easily switch between Sage 200 companies without the need to log out

Report on Purchase Requisitions from Sage 200

- Purchase requisition tables are available to report on from within Sage 200 using the standard Sage 200 Report Designer.

Installing Web PO Requisition for Sage 200

Full installation instructions for the Web PO Requisition for Sage 200 module can be found the accompanying **Web PO Requisition for Sage 200 Installation Guide**.

Accessing Web PO Requisition for Sage 200

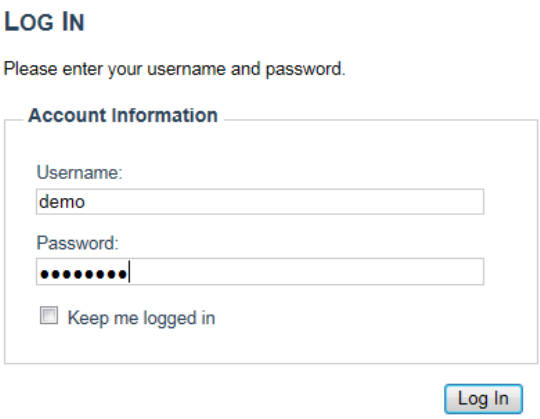
Web PO Requisition for Sage 200 is accessed via a web browser such as Internet Explorer or Google Chrome. By default the website URL for Web PO Requisition would be:

http://<servername>/S200WebEntry/

where <servername> would be replaced by the name of your server where the Web PO Requisition module has been installed. However this may be different depending on the alias name used in IIS when the website was installed, therefore your IT department should be able to confirm the exact URL for your site.

Logging In

When you first log in to the Web PO Requisition module for Sage 200 after it has been installed there will only be one user set up.



Type in your username and password provided and click on the **Log In** button to access the site. The default username is Administrator with the word “password” as the password – we would strongly recommend that you reset the password for this account when you first log in.

We would also recommend that you set up at least one other user with Administrator permissions in case you forget the Administrator password as this is the only way to access the Control Panel for configuring the module settings and creating new users.

Standard users are automatically logged into the default company specified for their Sage 200 username in the Control Panel. Company access is restricted through the standard Sage 200 System Administrator.

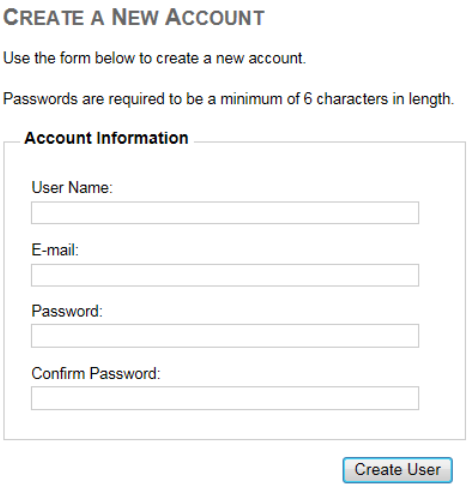
Setting up New Users

To create new Web PO Requisition users click on the **Control Panel** icon in the top right hand corner of the website. Note: This Control Panel icon will only be visible to Administrator users.

Click on the **Users** menu item on the left and click on the **Create New User** hyperlink.

Type in the username, e-mail address and password details for the new user and click on **Create User**.

Please note passwords must be a minimum of 6 characters.

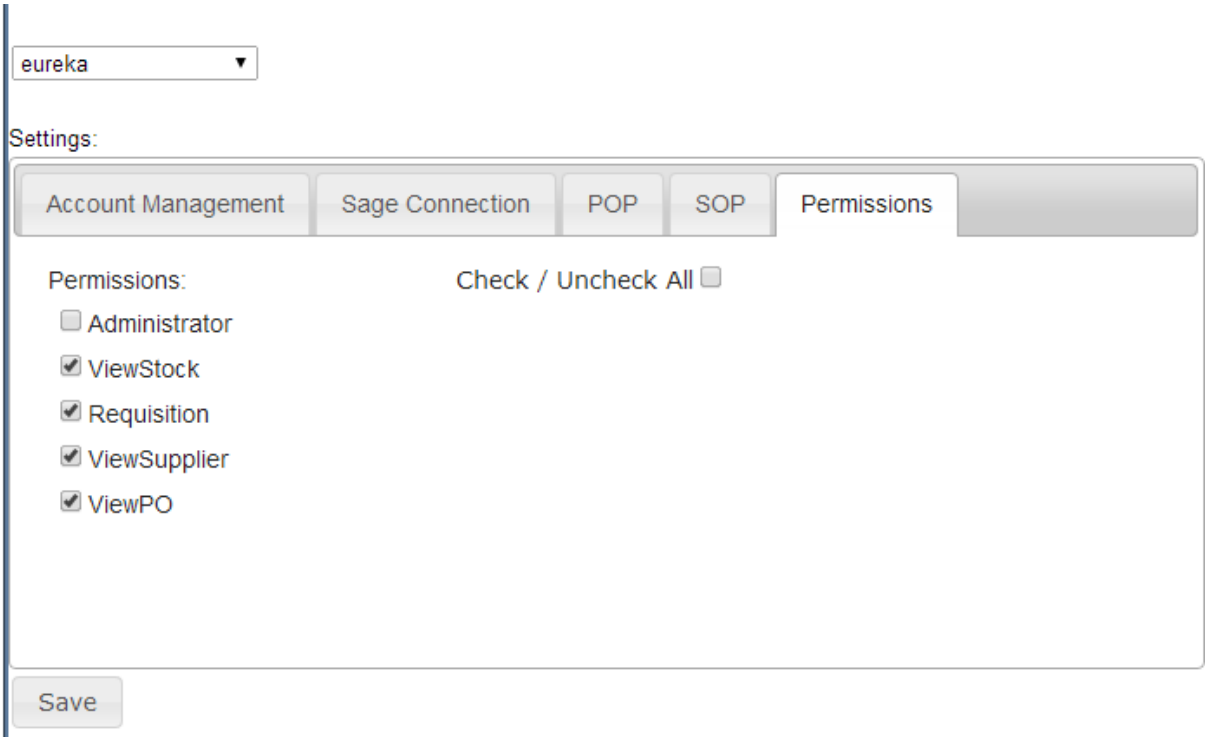


If the licenced number of named users has already been set up in the system a message will be displayed advising that additional licences would be needed.

- The maximum number of allowed users (28) has been reached. An upgraded license is required to add more users

After creating the new user an administrator can then log in and configure the user's permissions. Select the new user from the dropdown list and on the **Account Management** tab type in the **Sage Username** and **Sage Password** for the Sage 200 user that this web user should be linked to. This is the username that will be displayed as the Order Taker on new purchase orders in Sage 200 authorised from Requisitions by this web user. Having individual users will ensure a full audit log per user is tracked on purchase orders entered through the system.

Click on the **Permissions** tab to specify which areas of the Web PO Requisition module this user should have access to.

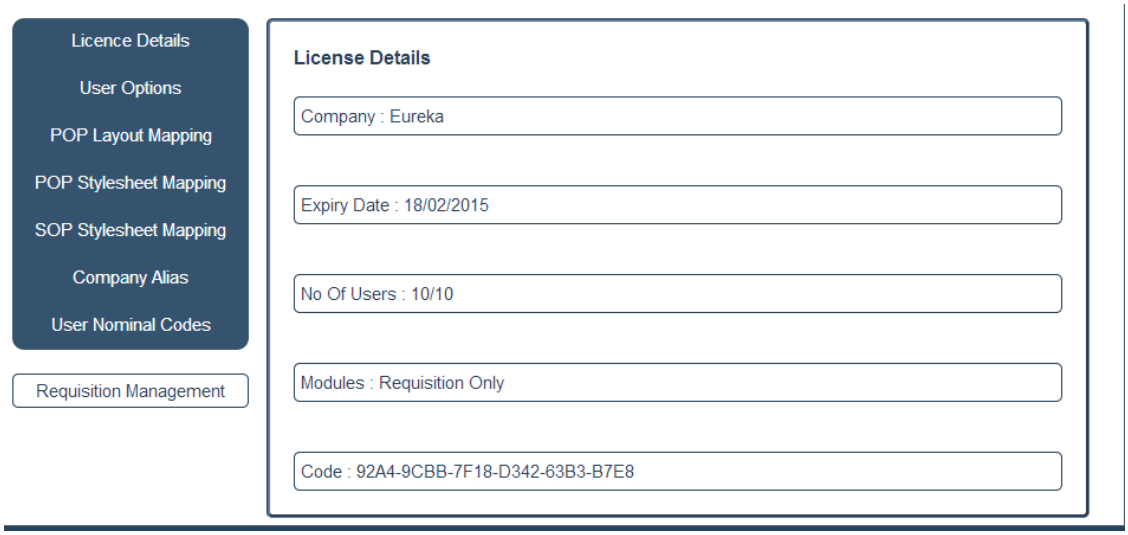


Tick all areas of the module that this user should have access to when they log in. If a user has not been given access to any of the areas in the module then the corresponding icons will be hidden in the menu bar at the top of the website when that user logs in. For example, if Administrator is not ticked for a particular user then the Control Panel icon will not be visible to that user.

When all permissions have been set as required click on **Save** to save the new user record.

Requisition Management Settings

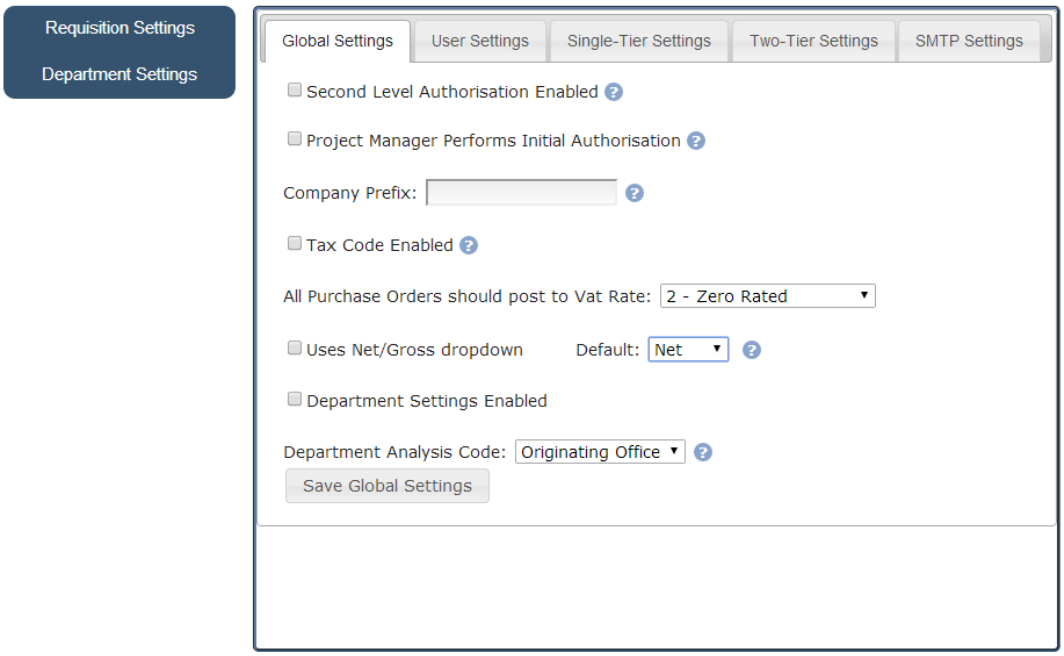
To access the requisition settings click on the Control Panel icon in the top right hand corner and then click on the **Requisition Management** button.



The Requisition Management button will lead you to the portal from where you can set up your authorisation process and user settings specific to purchase requisitions, with individual tabs for Global Settings, User Settings, Single-Tier Settings, Two-Tier Settings and SMTP Settings.

Global Settings

This tab area allows you to specify the global settings for your requisition process.



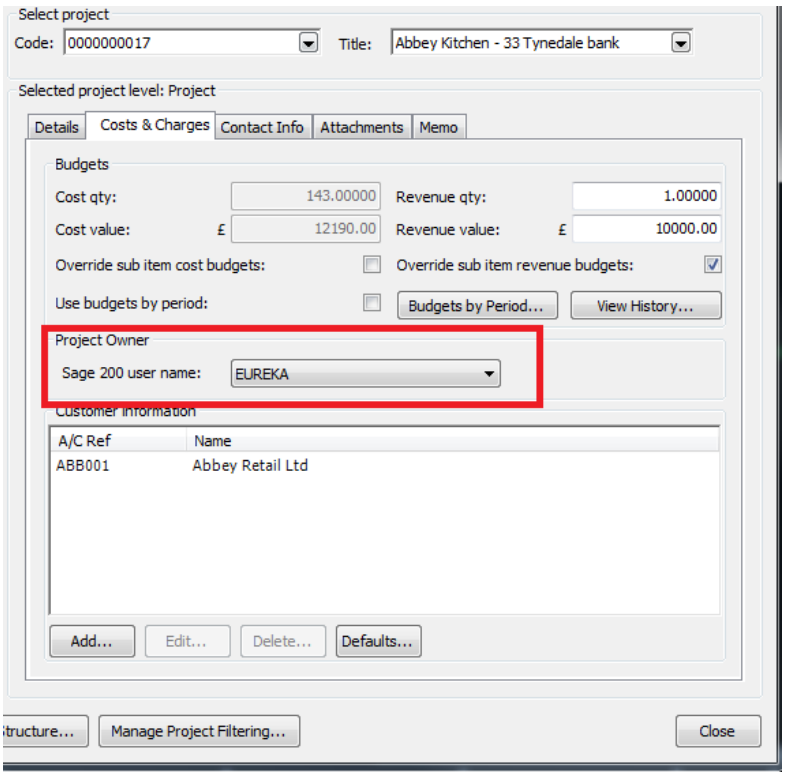
Single Level Authorisation – By default this is the authorisation process followed if the Second Level Authorisation Enabled setting is **not** checked.

This is a value based system where the system checks if the user creating/approving the requisition has the authority to convert a Purchase Requisition to a Purchase Order based on the value of the requisition and the Max Value of Approval set against the user who entered the purchase requisition. These levels of authorisation can be set up on a per user basis within the Single-Tier Settings tab outlined later in this document.

Second Level Authorisation Enabled – If this option is checked then the system follows an authorisation process where two people with the necessary levels of authorisation must both approve a purchase requisition before it is converted into a Purchase Order.

These levels of authorisation can be set up on a per user basis within the Two-Tier Settings tab outlined later in this document. This level of approval is hierarchical, with one authoriser having to approve the purchase requisition initially before being passed to a second authoriser to then approve it.

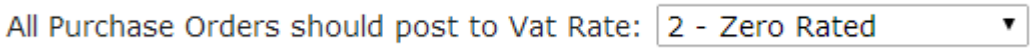
Project Manager Performs Initial Authorisation – If this option and the **Second Level Authorisation Enabled** setting are both enabled the user specified as the Project Owner of the project in Sage 200 Project Accounting will be able perform the first part of authorisation.



This Sage User must be linked to a Web User account within the Requisition system and is redundant if Second Level Authorisation is not enabled.

Company Prefix – Web PO Requisition will automatically generate a sequential purchase requisition number for each new requisition. This setting allows the user to specify a prefix to be used at the start of the requisition number when a requisition has been created.

Tax Code Enabled – If enabled, regardless of the Tax Rate selected on the line for requisition, when any requisition is converted to a purchase order the purchase order lines will all use the selected tax rate specified on this screen:



Uses Net/Gross dropdown – If enabled, this adds an extra column to the Line Order Entry in the Create Requisition screen from which the user can select whether they are entering the Net or Gross value in the Unit Price field.

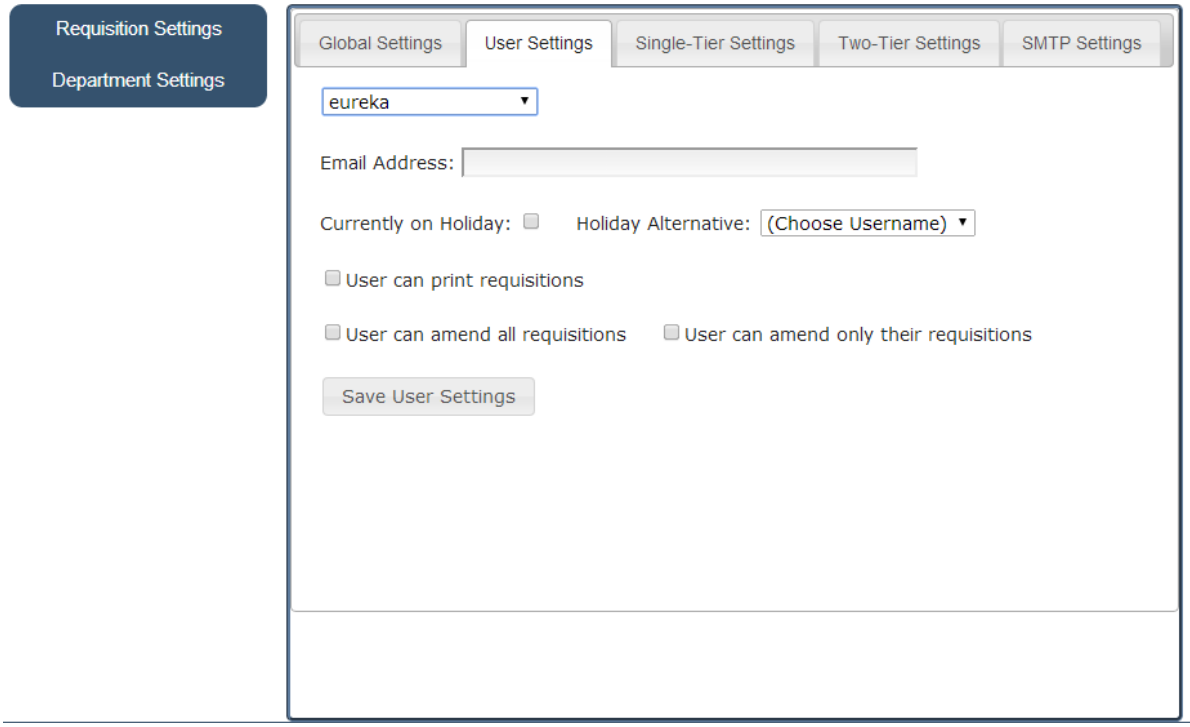
- If **Gross** is selected the user can enter what they wish the Gross Value for the line to be the Unit Price column, then the system will calculate what the unit price should be to match this Gross Value whilst taking into account the selected Tax Rate.
- If **Net** is selected, the system will use the Unit Price entered and selected Tax Rate to calculate the Gross Value of the item line.

Department Settings Enabled – If this option is enabled the system will add in the following functionality based on the Department Settings explained later:

- Departments are created and have nominal codes associated against these Departments.
- User selects a Department for each requisition from which they are assigned when creating a requisition.
- This limits what Nominal Codes can be assigned for each line.
- Users can only view Purchase Orders that have been converted from their own requisitions or can be set up to view other Purchase Orders assigned to the users Department(s)
- The selected Department Short Code will be stored against the selected Department Analysis Code when the purchase requisition is converted to a purchase order.

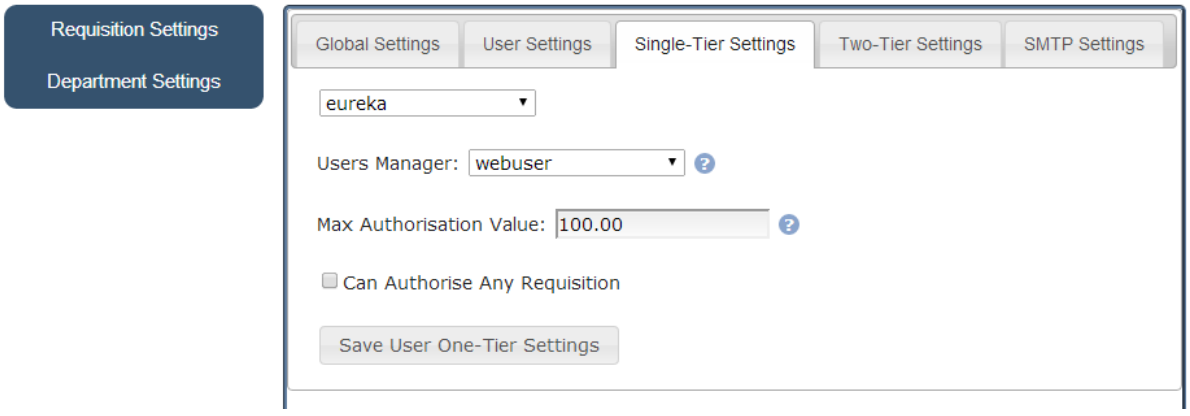
User Settings

This tab allows you to select an existing Web PO Requisition user from the dropdown list and specify individual user settings specific to the requisition functionality.



- **Email Address –** The Email Address the user can be sent all correspondence.
- **Currently On Holiday –** If this setting is enabled and a Holiday Alternative has been selected from the dropdown list of users, this selected alternative user will then be able to authorise any purchase requisitions normally approved by this user.
- **User Can Print Requisition –** Allows the user to print a PDF of the requisition.
- **User Amend Requisitions -** User can be allowed to amend all purchase requisitions, only their own requisitions, or no requisitions (by leaving both boxes unticked).

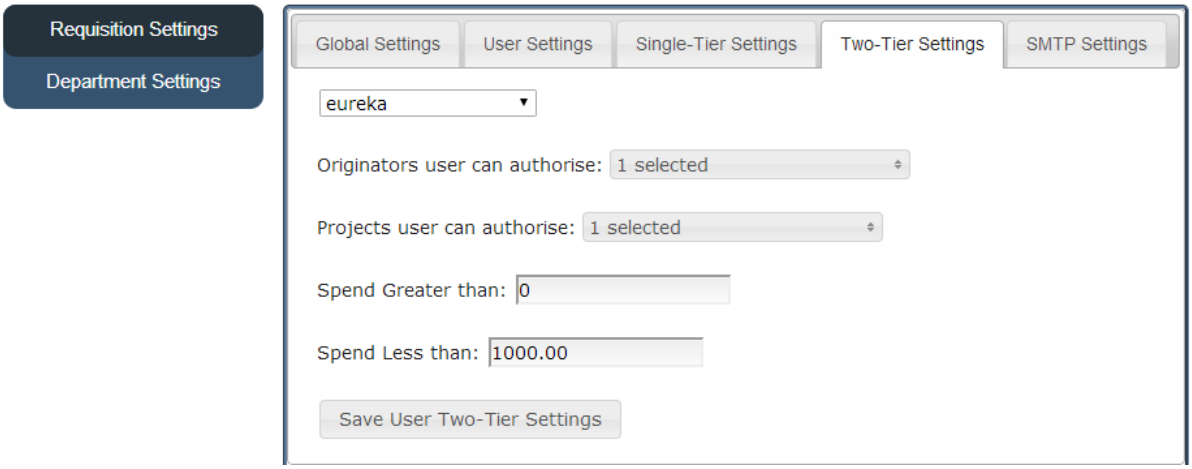
Single-Tier Settings



These settings apply when using Single Level Authorisation for purchase requisitions.

- **Users Manager –** If the value of the purchase requisition that this user creates or approves is above their Max Authorisation Value it will be elevated to the selected for approval.
- **Max Authorisation Value -** If the value of a Requisition when created or approved is equal to or below this value, the requisition will convert to a Purchase Order.
- **Can Authorise Any Requisition –** When selected the users Requisitions will be converted automatically to a Purchase Order and all Requisitions waiting for approval will show up in the users Approve Requisition list.

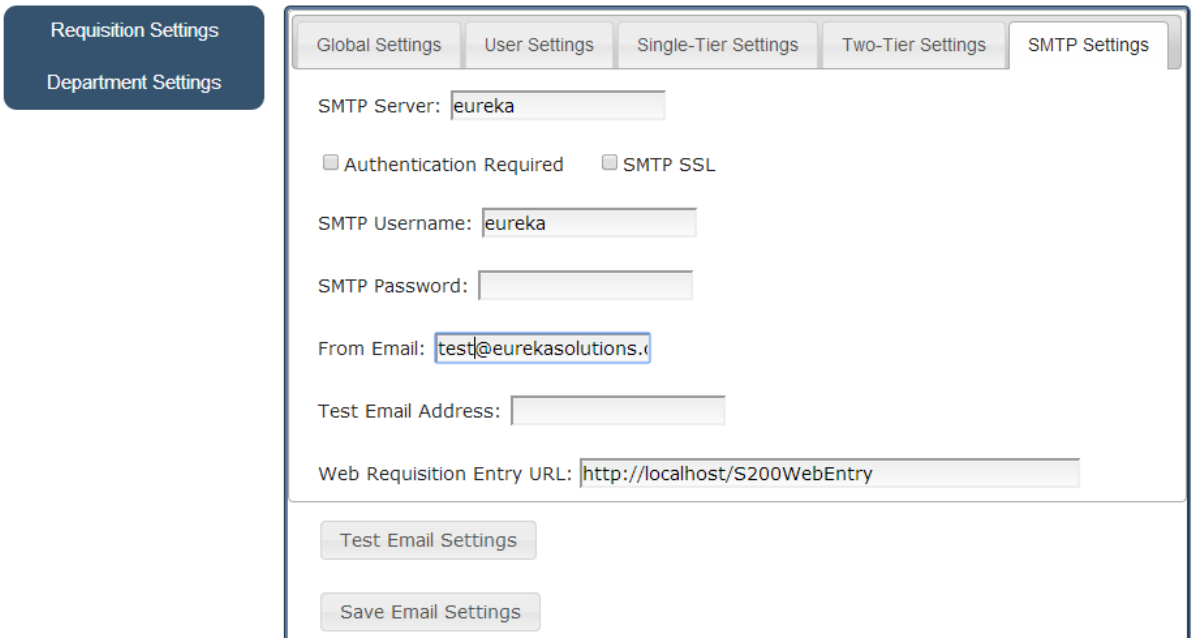
Two-Tier Settings



These are the user settings the system follows when Second Level Authorisation is enabled.

- **Originators User Can Authorise –** The list of originators who's requisitions the user can authorise provided the value of the requisition falls between the specified **Spend Greater than** and **Spend Less than** values.
- **Projects User Can Authorise –** The list of projects (from Sage 200) which the user can authorise purchase requisitions for, provided the value of the Requisition falls between the specified **Spend Greater than** and **Spend Less than** values.

SMTP Settings



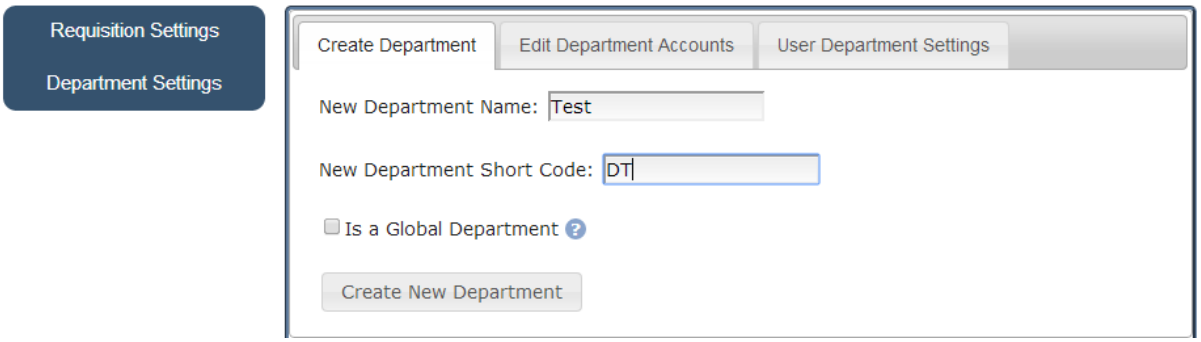
These are the settings required for email correspondence to be sent for Authorisation.

Web PO Requisition URL – This will provide a link to be included in the authorisation emails that are sent to approvers to where the user can log in to approve or decline a purchase requisition. This URL must include the /S200WebEntry, only amend the Domain Name to store the address of the S200WebEntry:

e.g. http://*domainname*/S200WebEntry

Department Settings

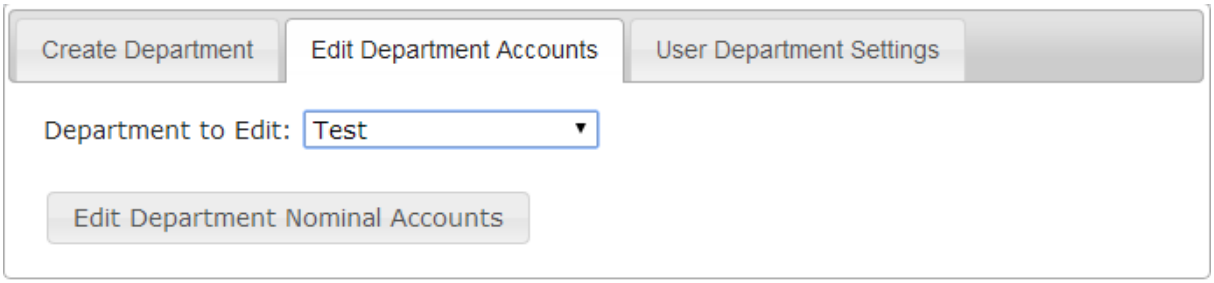
Create Department



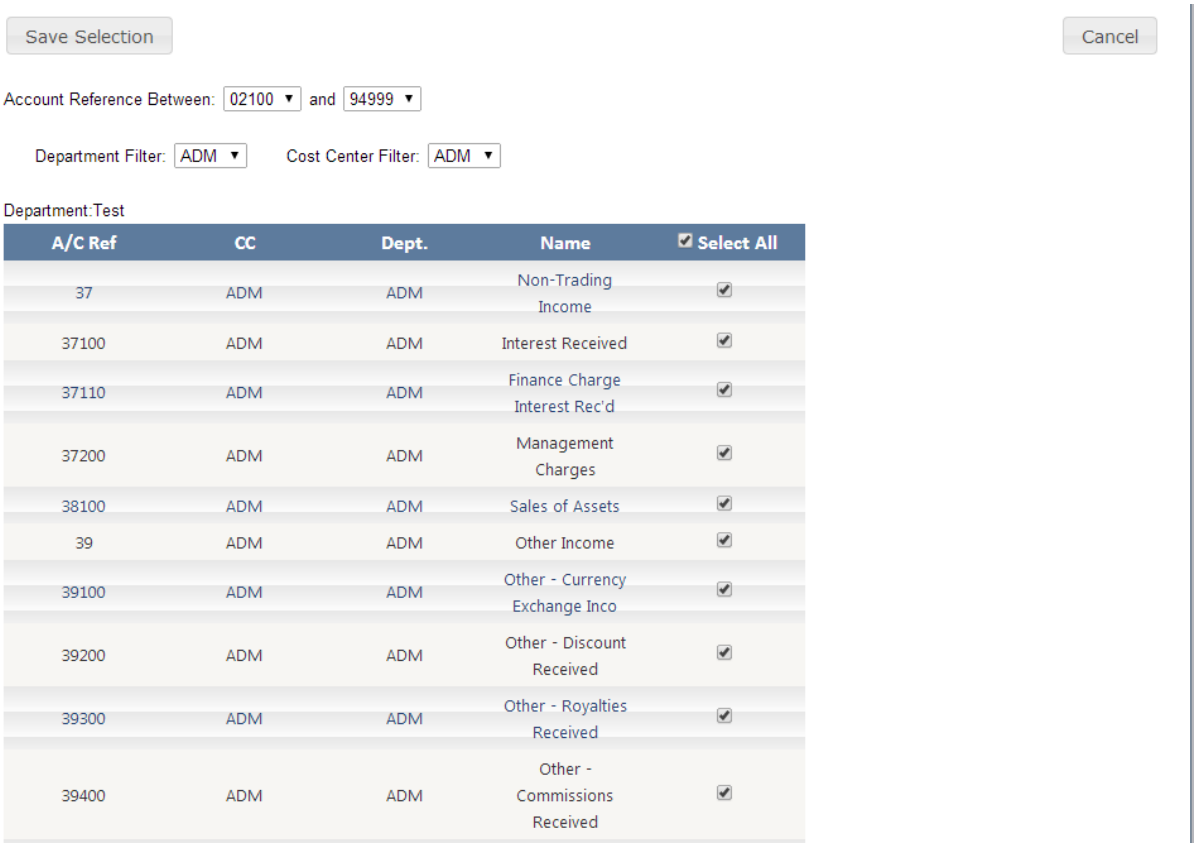
Allows a Department to be created, specifying the Department's Name and Short Code and whether it's a Global Department or not.

A Global Department is one where all Nominal Codes are assigned against it.

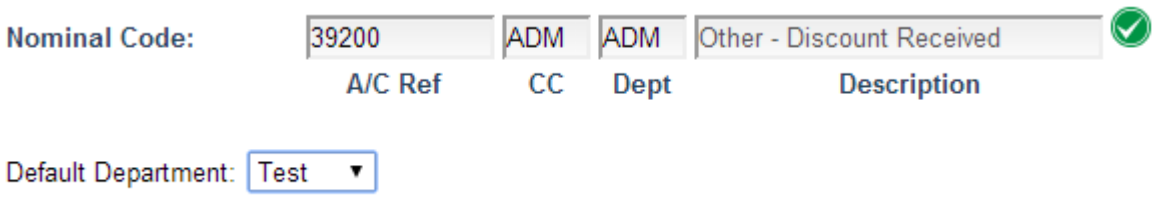
Edit Department Accounts



Can edit the Nominal Accounts enabled against the Department through the following screen:

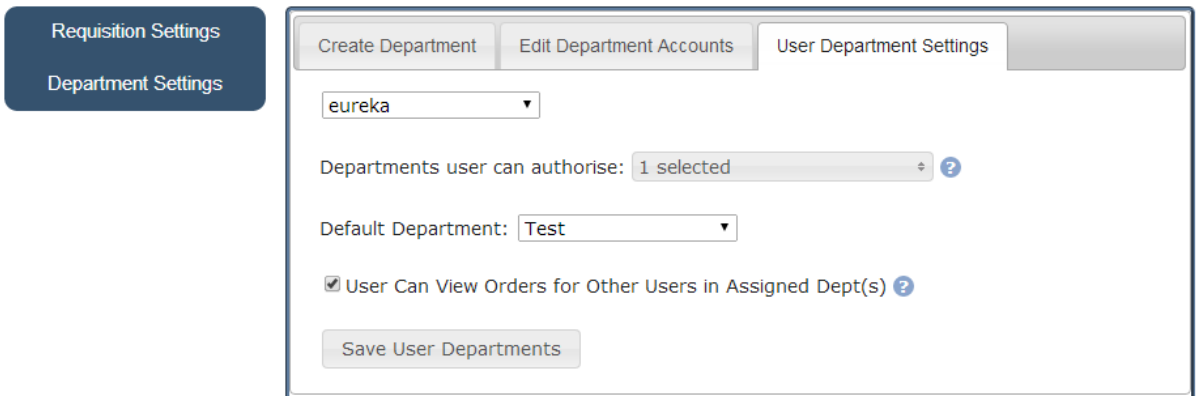

Save Selection
Cancel
Account Reference Between: 02100 and 94999
Department Filter: ADM
Cost Center Filter: ADM
Department:Test
A/C Ref | CC | Dept. | Name | Select All
37 | ADM | ADM | Non-Trading Income
37100 | ADM | ADM | Interest Received
37110 | ADM | ADM | Finance Charge Interest Rec'd
37200 | ADM | ADM | Management Charges
38100 | ADM | ADM | Sales of Assets
39 | ADM | ADM | Other Income
39100 | ADM | ADM | Other - Currency Exchange Inco
39200 | ADM | ADM | Other - Discount Received
39300 | ADM | ADM | Other - Royalties Received
39400 | ADM | ADM | Other - Commissions Received

If a Nominal Account is selected then the user can select this when the associated Department is picked when creating a Requisition.



User Department Settings

Provides the functionality to select the Departments on a per user basis they can be assigned to.



Default Department – The Default Department selected in the Department drop down when creating a new purchase requisition.

User Can View Orders for Other Users in Assigned Dept.(s) – By default if the Department Settings are enabled a user can only view purchase orders that have been created from purchase requisitions where they were the Originator.

This setting allows them to view other Purchase Orders that the original Requisition has had one of the user's authorised departments assigned against it.

Requisition Portal

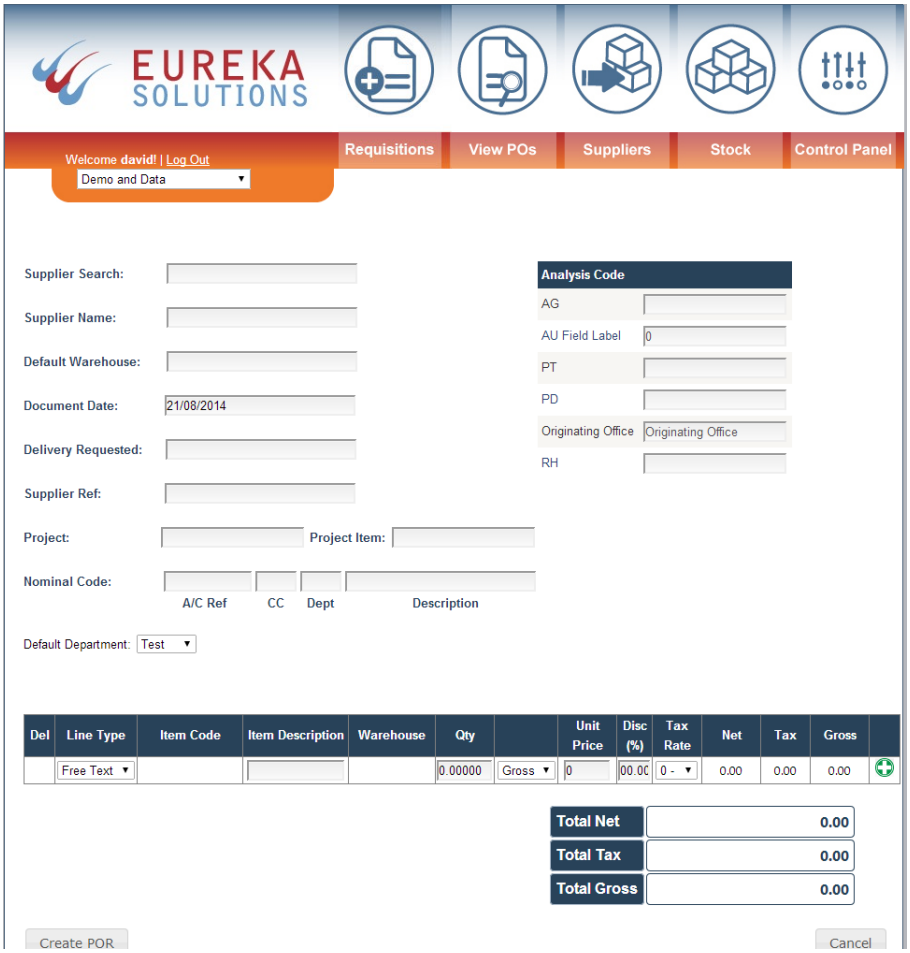
The requisition portal provides access to all aspects of the Web PO Requisition for Sage 200 module and can be accessed by hovering over or clicking on the **Requisitions** tab at the top of the screen.

Please note the Requisitions tab will only be visible if the logged on user has been given access to requisitions through the Control Panel.

Hovering over the Requisitions icon will display a dropdown menu to allow the user to create, view or authorise purchase requisitions, depending on their user permissions.

Creating a Purchase Requisition

To create a new purchase requisition, hover over the Requisitions icon in the top navigation bar and click on Create PO Requisition. This will open a blank purchase requisition form for the user to enter the details of the goods or services that they are requesting to order.

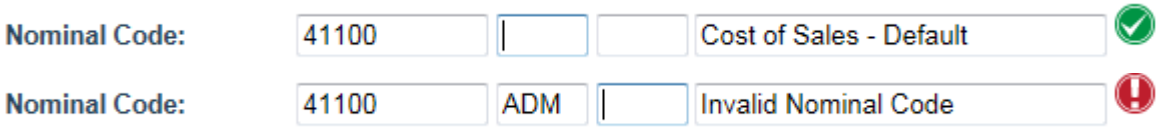


In the **Supplier Search** field users can search for a supplier account by entering either the Supplier Account Reference, Supplier Account Name, or Postcode. Simply type in the first few letters and the dropdown list will automatically be filtered to display the matching supplier accounts.

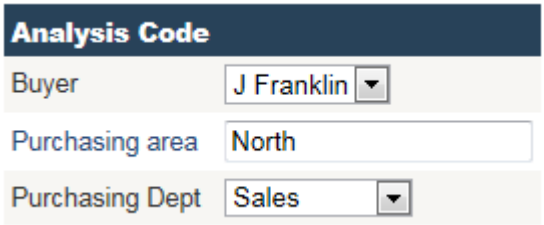
Select a supplier account and the **Supplier Name** field will be automatically populated. Users can select a **Default Warehouse** for the purchase order, although this can be changed on individual order lines if required.

There is a setting in the module to enable a global nominal code to be entered at the purchase requisition header level which will then override the nominal code on all item lines for the purchase requisition. If this setting is enabled the **Nominal Code** field will appear on the **Create Requisition** screen.

Nominal codes are validated as they are entered to ensure that these are valid nominal codes in the Sage 200 database.



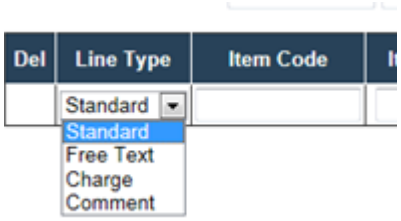
The Analysis Codes for the purchase requisition will be pulled through automatically from the linked Sage 200 company and can be updated or amended through the web interface as required.



Within the module there is also a setting to enable a global project code to be entered at the purchase requisition header level which will then set a Global Project Code for all item lines the purchase requisition. If this setting is enabled the **Project** and **Project Item** field will appear on the **Create Requisition** screen at the header level.

Adding Item Lines to a Purchase Requisition

You can then add the items to the purchase requisition. In the Line Type column select **Standard** from the dropdown to enter a standard stock item, **Free Text** to add a free text item line, **Comment** to add a comment line, or **Charge** to add an additional charge, similar to standard Sage 200 functionality.



Select the required line type and tab across the line entering the quantity, price and discount details where applicable.

Del	Line Type	Item Code	Item Description	Warehouse	Qty	Unit Price	Disc (%)	Tax Rate	Net	Tax	Gross	
	Standard	ACS/BLENDER	Professional Blende	WAREHOU	5	11.5281	00.0(	1 - Std Rat	57.64	10.09	67.73	

When you have entered all requisition line details click on the green plus icon at the end of the line to update it.

Depending on the user settings there may be an additional column on this grid for whether the Unit Price being entered by the user is the Net price or Gross price. If the Global Setting for **Use Net/Gross** is not checked then this column will not be visible.

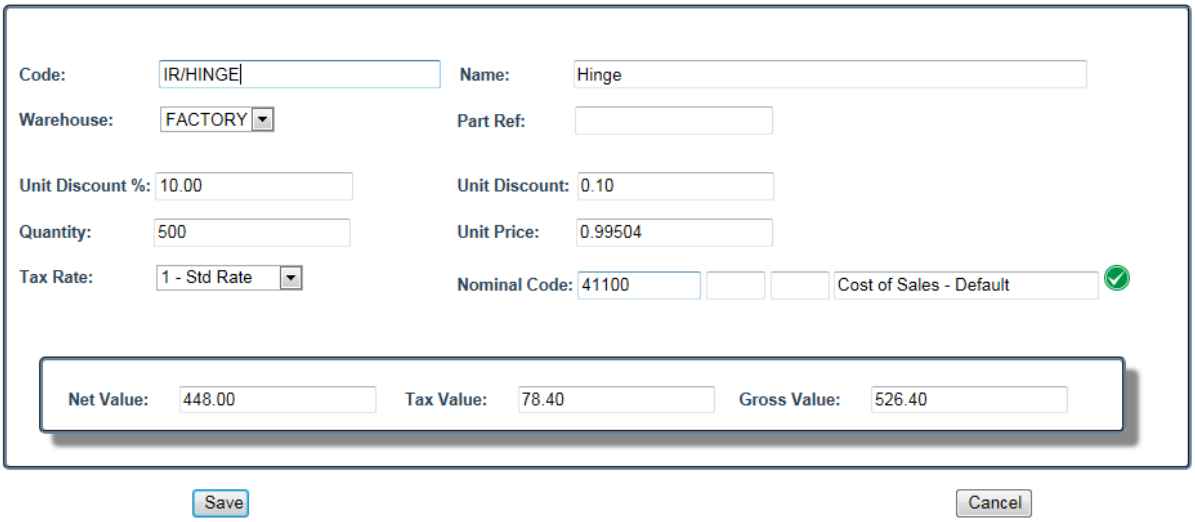
Continue adding item lines to the purchase requisition as required. The **Net**, **Tax** and **Gross** total values will update automatically as item lines are added to the purchase requisition.

Del	Line Type	Item Code	Item Description	Warehouse	Qty	Unit Price	Disc (%)	Tax Rate	Net	Tax	Gross	
	Standard	ACS/BLENDER	Professional Blend...	WAREHOUSE	5	11.52819	0.00	1 - Std Rate	57.64	10.09	67.73	
	Standard	IR/HINGE	Hinge	FACTORY	100	0.99504	0.00	1 - Std Rate	99.50	17.41	116.91	
	Free Text		Implementation		1	50	0.00	1 - Std Rate	50.00	8.75	58.75	
	Comment		Date of visit still TBC									
	Charge	Delivery	Delivery		1	20	0	1 - Std Rate	20	3.50	23.50	
	Standard				0.00000	0.0000(	00.0(					

Total Net	**227.14**
Total Tax	**39.75**
Total Gross	**266.89**

Editing Existing Item Lines

To edit an existing requisition line, for example to change the nominal code for a stock item line, click on the yellow pencil icon at the end of the item line.



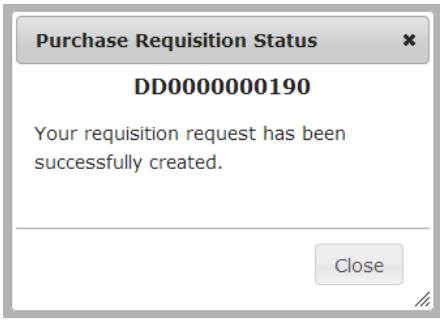
Edit the item line details as required and click on **Save** to return to the main purchase requisition entry screen.

To delete an existing item line from the requisition click on the red bin icon at the start of the line.

Reorder Item Lines on a Purchase Requisition

Once lines have been added to the requisition, they can be reordered by simply dragging and dropping the row to where you wish the line to now be, simply drag this icon up or down the table, this will appear the line has been added.

When you have entered all of the lines on the purchase order, click the **Create POR** button in the bottom left hand corner. The requisition will then be saved and submitted for approval if required. A message box will be displayed confirming the requisition number that has been created for this requisition.



The users who have the authority to further authorise the purchase requisition will then be notified by email that there is a requisition awaiting their approval, along with details of the requisition itself. The email layout can be amended if required.

Purchase Requisiton: DD0000000193 has been approved.

Purchase Order: 0000003898 has been created.

Requisition DD0000000193 entered on 21-08-2014

Requisition Order Details

Requisition No	DD0000000193	Document Date	21-08-2014
Requested Date	21-08-2014	Currency	£
Order Originator		(@eurekasolutions.co.uk)	

AB Cookers (ABC001)

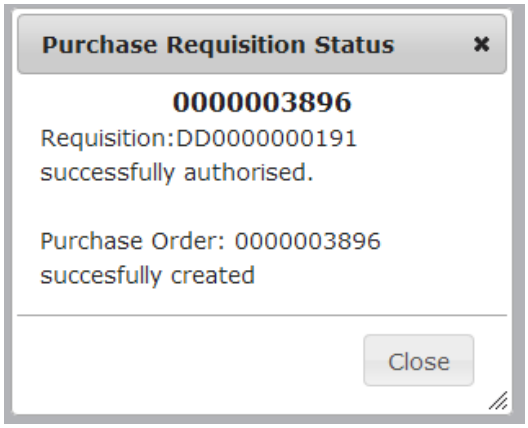
Blackburn
Lancashire
Great Britain

Code	Description	Quantity	Price	Net Value	Nominal Spec	Project Code	Project Item
	Free Text Line	100.00000	250.00000	30000.00	44101/SAL/ADM	0000000017	Measurements
ACS/BLENDER	Professional Blender 5 Speed	100.00000	300.00000	36000.00	44101/SAL/ADM	0000000017	Measurements
	Comment Line	1.00000	0.00000	0.00	//		
Delivery	Delivery	1.00000	250.00000	300.00	//		

Total Net	55250.00
Total Tax	11050.00
Total Gross	66300.00

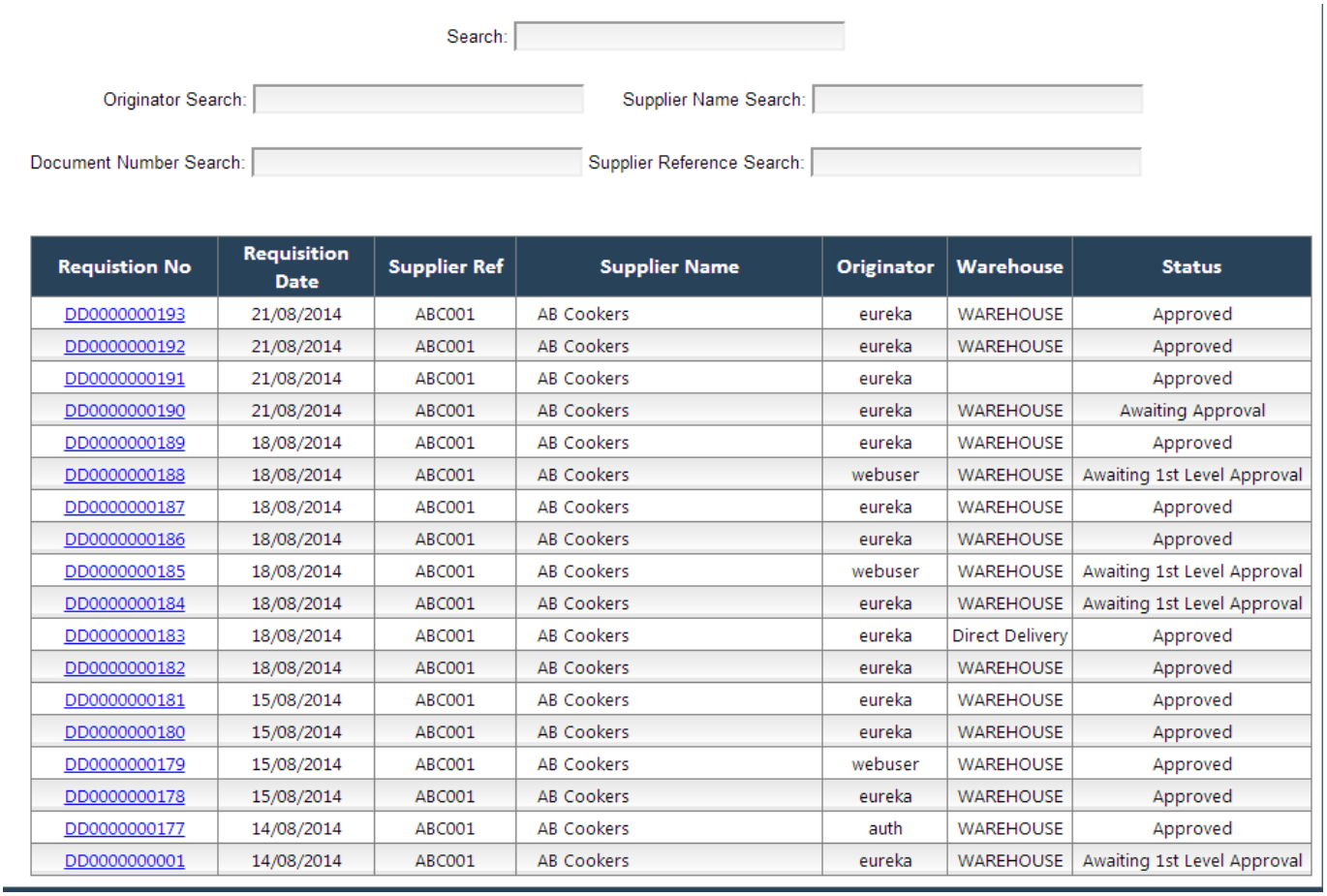
If you wish to amend this e-mail template then the file is stored in the C:\inetpub\wwwroot\S200WebService\App_Data folder on the server where Web PO Requisition is installed. In this folder there will be a file named POPRequisitionNotification.xsl and you can edit the HTML in this file to amend the layout for the email template.

If however the user has met the criteria for the requisition to be converted to a Purchase Order without the need for authorisation then a message box will displayed showing both the requisition number and the purchase order number that has been created. The purchase order will be created automatically in Sage 200 instantly, based on the details entered on the requisition.



View Existing Purchase Requisitions

Users are able to view a list of existing purchase requisition. Click on the Requisition icon and select **View PO Requisition** to view a list of all purchase requisitions that the user has access to.



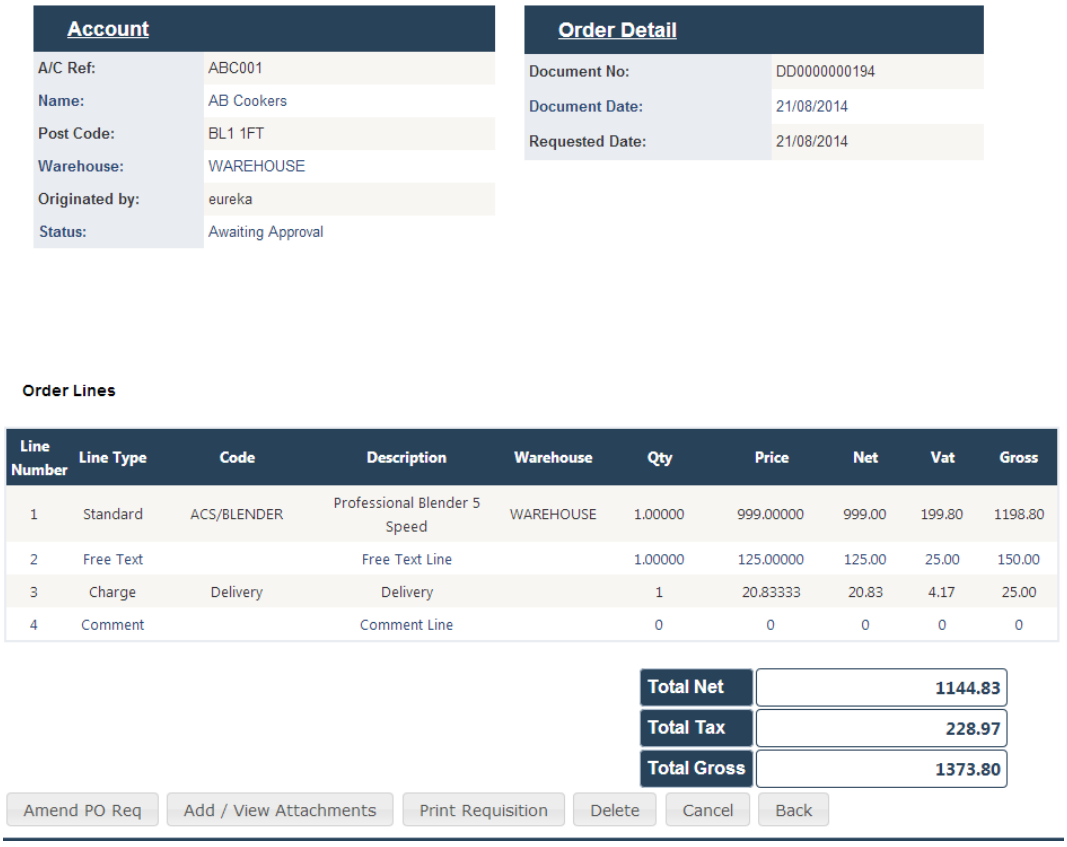
Requistion No	Requisition Date	Supplier Ref	Supplier Name	Originator	Warehouse	Status
DD0000000193	21/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000192	21/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000191	21/08/2014	ABC001	AB Cookers	eureka		Approved
DD0000000190	21/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Awaiting Approval
DD0000000189	18/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000188	18/08/2014	ABC001	AB Cookers	webuser	WAREHOUSE	Awaiting 1st Level Approval
DD0000000187	18/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000186	18/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000185	18/08/2014	ABC001	AB Cookers	webuser	WAREHOUSE	Awaiting 1st Level Approval
DD0000000184	18/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Awaiting 1st Level Approval
DD0000000183	18/08/2014	ABC001	AB Cookers	eureka	Direct Delivery	Approved
DD0000000182	18/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000181	15/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000180	15/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000179	15/08/2014	ABC001	AB Cookers	webuser	WAREHOUSE	Approved
DD0000000178	15/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Approved
DD0000000177	14/08/2014	ABC001	AB Cookers	auth	WAREHOUSE	Approved
DD0000000001	14/08/2014	ABC001	AB Cookers	eureka	WAREHOUSE	Awaiting 1st Level Approval

You can also search for a particular requisition by typing the supplier account reference, supplier account name or postcode into the **Search** field at the top of the list.

This search is further supplemented by four more specific searches; **Supplier Name, Originator Name, Document Number** and **Supplier Reference** searches.

Requistion No	Requisition Date	Supplier Ref	Supplier
DD0000000193	21/08/2014	ABC001	AB Cookers
DD0000000192	21/08/2014	ABC001	AB Cookers

Click on the blue hyperlink in the **Requisition No** column to view a requisition order details from the list.



Account

A/C Ref:	ABC001
Name:	AB Cookers
Post Code:	BL1 1FT
Warehouse:	WAREHOUSE
Originated by:	eureka
Status:	Awaiting Approval

Order Detail

Document No:	DD0000000194
Document Date:	21/08/2014
Requested Date:	21/08/2014

Order Lines

Line Number	Line Type	Code	Description	Warehouse	Qty	Price	Net	Vat	Gross
1	Standard	ACS/BLENDER	Professional Blender 5 Speed	WAREHOUSE	1.00000	999.00000	999.00	199.80	1198.80
2	Free Text		Free Text Line		1.00000	125.00000	125.00	25.00	150.00
3	Charge	Delivery	Delivery		1	20.83333	20.83	4.17	25.00
4	Comment		Comment Line		0	0	0	0	0

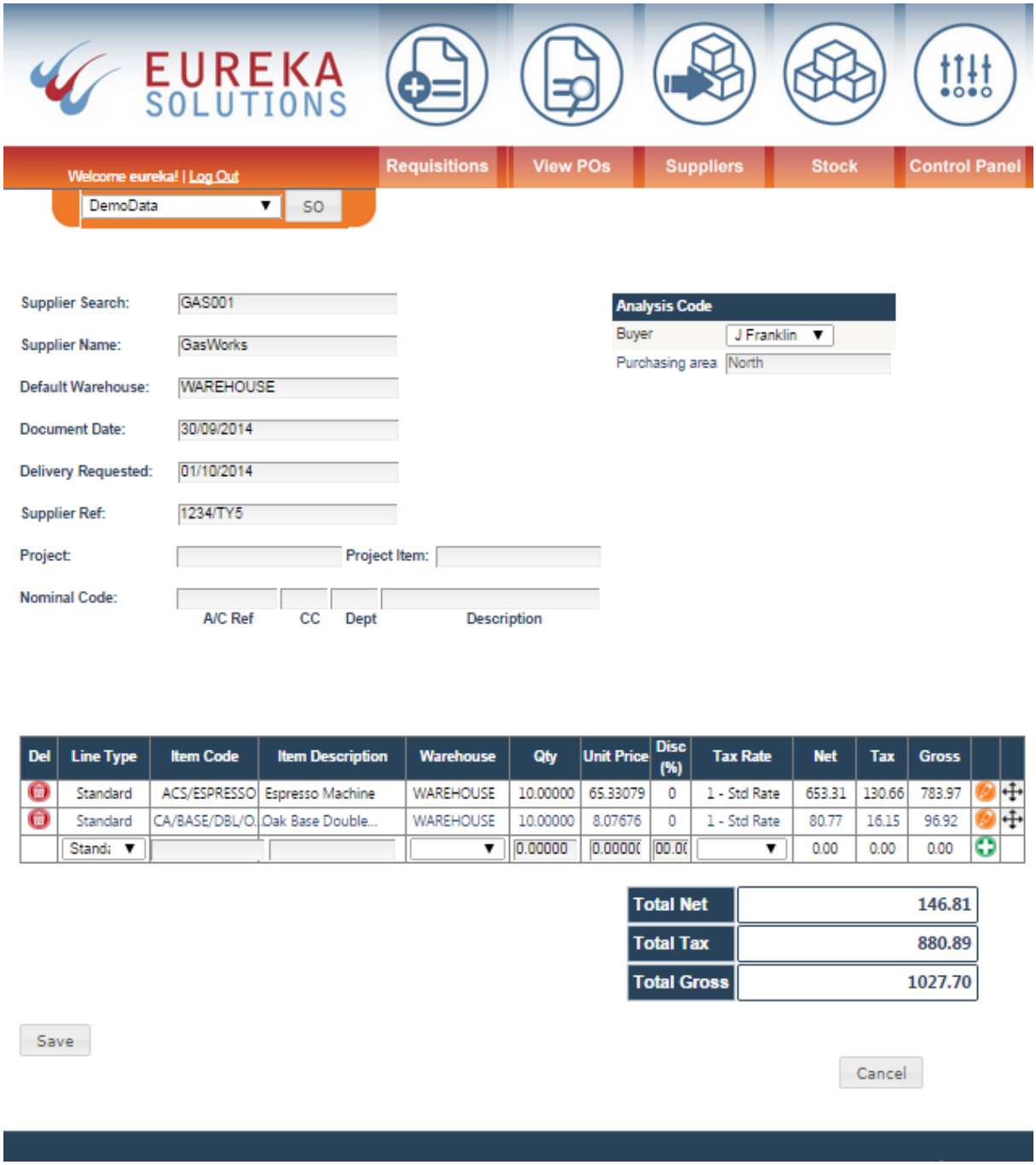
Total Net	1144.83
Total Tax	228.97
Total Gross	1373.80

Amend PO Req | Add / View Attachments | Print Requisition | Delete | Cancel | Back

Amending an Existing Purchase Requisition

Purchase requisitions that have not yet been approved can be amended if the user has permission to do this. Users can be given access through the Control Panel to either amend all purchase requisitions or only their own requisitions. Amending a purchase requisition is the same process as creating a requisition and amended purchase requisitions will be sent back to the start of the authorisation process to be approved again.

From the **View PO Requisition** screen, click on the blue hyperlink for the purchase requisition number that you want to amend and then click on the **Amend PO Req** button at the bottom of the screen. This will open the requisition in edit mode for the user to add, edit or delete lines as required.

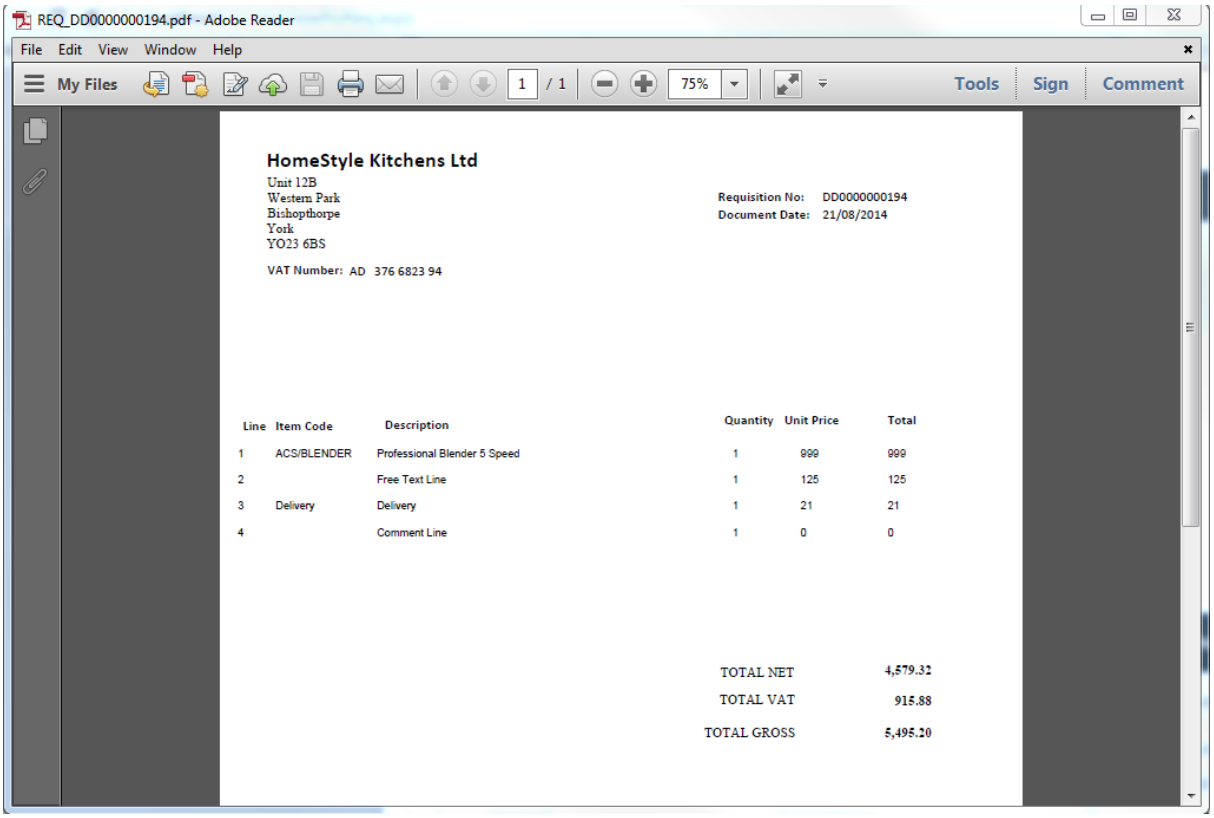


When all required changes have been made click on **Save** to save the amended requisition and submit it for authorisation again, or click on **Cancel** to return to the View Purchase Requisition list without saving your changes.

Once a purchase requisition has been approved and the corresponding purchase order has been created in Sage 200 the purchase requisition can no longer be amended.

Printing Existing Purchase Requisitions

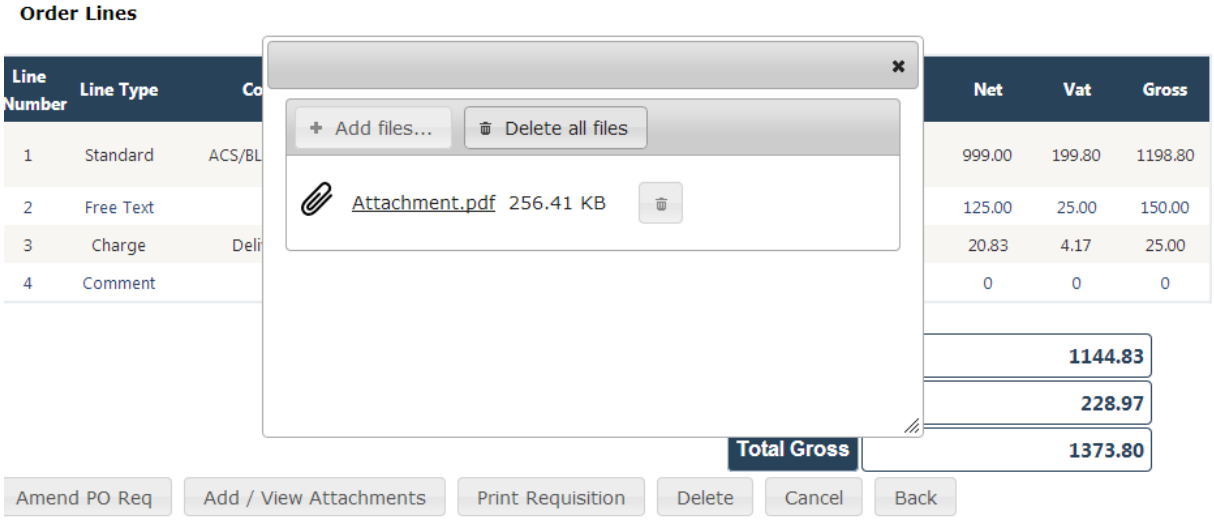
When viewing a purchase requisition, if the user has permission, there is also a **Print Requisition** button to allow the user to create a PDF of the requisition that can then be printed or e-mailed if required, or click **Back** to return to the requisition list.



The PDF generated uses a Sage 200 Report Designer requisition layout that can be amended if required. A default layout file named "**Requisition (Single).layout**" will be created in the \\servername\S200WebService\App_Data folder (where servername would be replaced with the name of your server) as part of the Web PO Requisition installation. This layout file can be amended as required using the Sage 200 Report Designer but must be saved in this location to be picked up by the module when printing purchase requisitions.

Attaching Files to a Purchase Requisition

Files such as images or PDF documents can be attached against a requisition for reference by selecting the **Add/View Attachments** button and browsing to the location where the file is stored to upload it**.** Files can also be dragged onto the screen to attach them using standard drag and drop functionality.



Multiple files can be attached to each requisition. Attachments can also be deleted from this screen either individually, by clicking on the bin icon next to each attachment, or in one go by clicking **Delete All Files**.

Cancelling a Purchase Requisition

Purchase requisitions that have not yet been fully approved can be cancelled if required. To cancel a purchase requisition before it has been approved, go to the View PO Requisition screen, click on the blue hyperlink for the purchase requisition number that you want to cancel and once you are viewing the requisition click on the **Cancel** button at the bottom of the screen. The status of the purchase requisition will then be set to **Cancelled**.

Once a purchase requisition has been approved and the corresponding purchase order has been created the purchase requisition can no longer be cancelled.

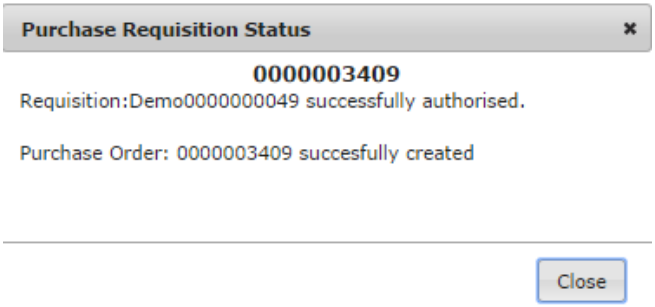
Approve or Decline Purchase Requisitions

A user can view the list of purchase requisitions that they have the authority to approve via the **Authorise PO Requisition** menu option in the Requisition Portal.

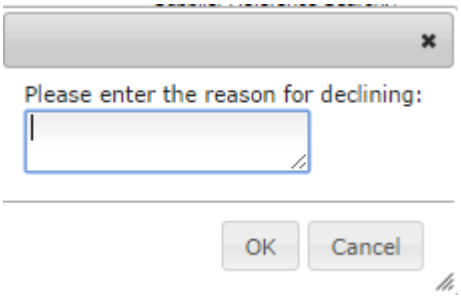
Req No	Req Date	Supplier Ref	Supplier Name	Warehouse	Orig. User	Status	Net Value	Approve	Decline
0000000002	21/08/2014	ABC001	AB Cookers	WAREHOUSE	webuser	Awaiting Approval	2709.13		

Click on the blue hyperlink in the **Requisition No** column to view the requisition for full details of the items on the purchase requisition before approving or declining the requisition.

To approve a purchase requisition from the list simply click the green plus icon in the **Approve** column. This will then check the user's authorisation level and either convert the requisition to a purchase order automatically in Sage 200 and mark the requisition as **Approved** or forward this for further approval if required.



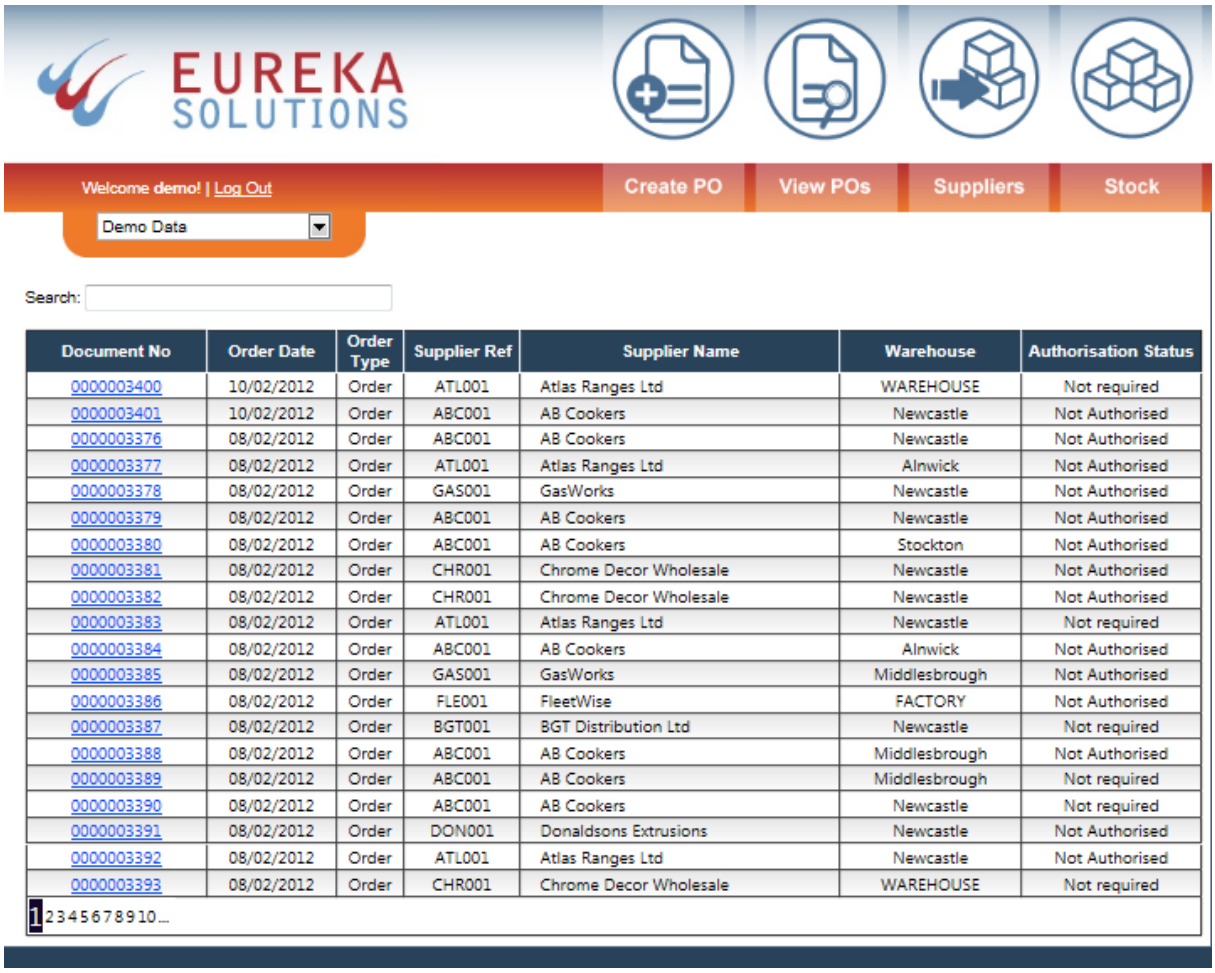
To decline the purchase requisition simply click the red bin icon in the **Decline** column. A pop-up box will then be displayed for the authoriser to enter the reason why this requisition request has been declined.



The Originator for the requisition will then receive an email explaining their requisition has been declined and the status of the purchase requisition will be set to **Declined**.

View Existing Purchase Orders & Returns

Users are able to view a list of existing purchase orders and purchase returns from Sage 200. Click on the **View PO** icon in the top left hand corner of the site and a list of purchase orders and returns from Sage 200 will be displayed.



Document No	Order Date	Order Type	Supplier Ref	Supplier Name	Warehouse	Authorisation Status
0000003400	10/02/2012	Order	ATL001	Atlas Ranges Ltd	WAREHOUSE	Not required
0000003401	10/02/2012	Order	ABC001	AB Cookers	Newcastle	Not Authorised
0000003376	08/02/2012	Order	ABC001	AB Cookers	Newcastle	Not Authorised
0000003377	08/02/2012	Order	ATL001	Atlas Ranges Ltd	Alnwick	Not Authorised
0000003378	08/02/2012	Order	GAS001	GasWorks	Newcastle	Not Authorised
0000003379	08/02/2012	Order	ABC001	AB Cookers	Newcastle	Not Authorised
0000003380	08/02/2012	Order	ABC001	AB Cookers	Stockton	Not Authorised
0000003381	08/02/2012	Order	CHR001	Chrome Decor Wholesale	Newcastle	Not Authorised
0000003382	08/02/2012	Order	CHR001	Chrome Decor Wholesale	Newcastle	Not Authorised
0000003383	08/02/2012	Order	ATL001	Atlas Ranges Ltd	Newcastle	Not required
0000003384	08/02/2012	Order	ABC001	AB Cookers	Alnwick	Not Authorised
0000003385	08/02/2012	Order	GAS001	GasWorks	Middlesbrough	Not Authorised
0000003386	08/02/2012	Order	FLE001	FleetWise	FACTORY	Not Authorised
0000003387	08/02/2012	Order	BGT001	BGT Distribution Ltd	Newcastle	Not required
0000003388	08/02/2012	Order	ABC001	AB Cookers	Middlesbrough	Not Authorised
0000003389	08/02/2012	Order	ABC001	AB Cookers	Middlesbrough	Not required
0000003390	08/02/2012	Order	ABC001	AB Cookers	Newcastle	Not required
0000003391	08/02/2012	Order	DON001	Donaldsons Extrusions	Newcastle	Not Authorised
0000003392	08/02/2012	Order	ATL001	Atlas Ranges Ltd	Newcastle	Not Authorised
0000003393	08/02/2012	Order	CHR001	Chrome Decor Wholesale	WAREHOUSE	Not required

1 2 3 4 5 6 7 8 9 10 ...

You can also search for a particular purchase order or return by typing the supplier account reference, supplier account name or postcode into the **Search** field at the top of the list.

This search is further supplemented by three more specific searches; **Supplier Name, Document Number** and **Supplier Reference** searches.

Search: DON

Document No	Order Date	Order Type	Supplier Ref	Supplier Name	Warehouse	Authorisation Status
0000003391	08/02/2012	Order	DON001	Donaldsons Extrusions	Newcastle	Not Authorised
0000003273	08/10/2010	Order	DON001	Donaldsons Extrusions		Not required
0000003232	01/10/2010	Order	DON001	Donaldsons Extrusions		Authorised
0000003198	24/09/2010	Order	DON001	Donaldsons Extrusions		Not required

Click on the blue hyperlink in the **Document No** column to view a purchase order from the list.

Account

A/C Ref:	JOH003
Name:	John Henderson Insurance
Post Code:	YO41 5LL
Warehouse:	Middlesbrough

Order Detail

Document No:	0000003355
Document Date:	07/02/2012
Authorisation Status:	Not required
Requested Delivery:	

Order Lines

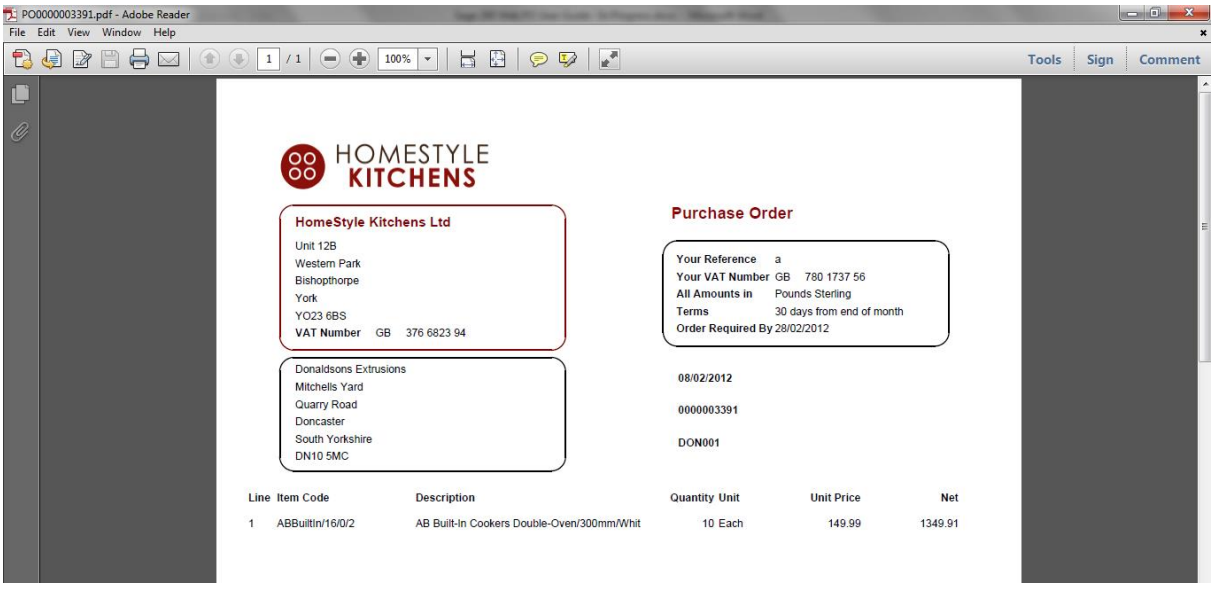
Line Type	Code	Description	Qty	Price	Net	Vat	Gross
0	ABBuiltIn/15/0/2	AB Built-In Cookers Single-Oven/300mm/White	1.00000	£149.99	149.99	£26.25	£176.24

Total Net	149.99
Total Tax	26.25
Total Gross	176.24

Print to PDF | Back

Printing Existing Purchase Orders

When viewing a purchase order, if the user has permission, there is also a **Print to PDF** button to allow the user to create a PDF of the purchase order that can then be printed or e-mailed if required, or click **Back** to return to the purchase order list.



PO0000003391.pdf - Adobe Reader

File Edit View Window Help

Tools Sign Comment

HOMESTYLE KITCHENS

HomeStyle Kitchens Ltd
Unit 12B
Western Park
Bishopthorpe
York
YO23 6BS
VAT Number GB 376 6823 94

Donaldsons Extrusions
Mitchells Yard
Quarry Road
Doncaster
South Yorkshire
DN10 5MC

Purchase Order

Your Reference a
Your VAT Number GB 780 1737 56
All Amounts in Pounds Sterling
Terms 30 days from end of month
Order Required By 28/02/2012

08/02/2012

0000003391

DON001

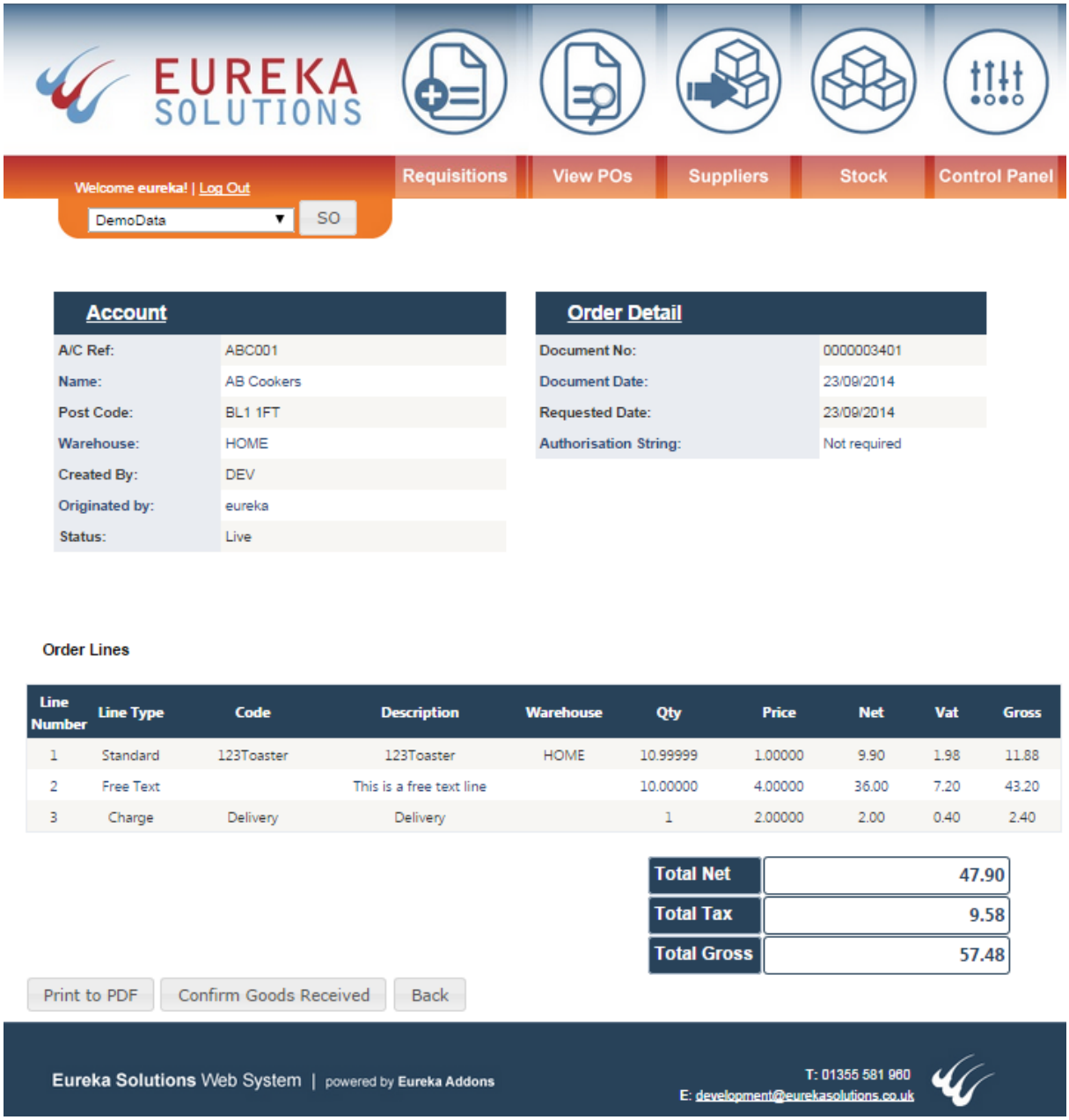
Line	Item Code	Description	Quantity	Unit	Unit Price	Net
1	ABBuiltIn/16/0/2	AB Built-In Cookers Double-Oven/300mm/Whit	10	Each	149.99	1349.91

The PDF generated uses a standard Sage 200 Report Designer purchase order layout that can be amended if required.

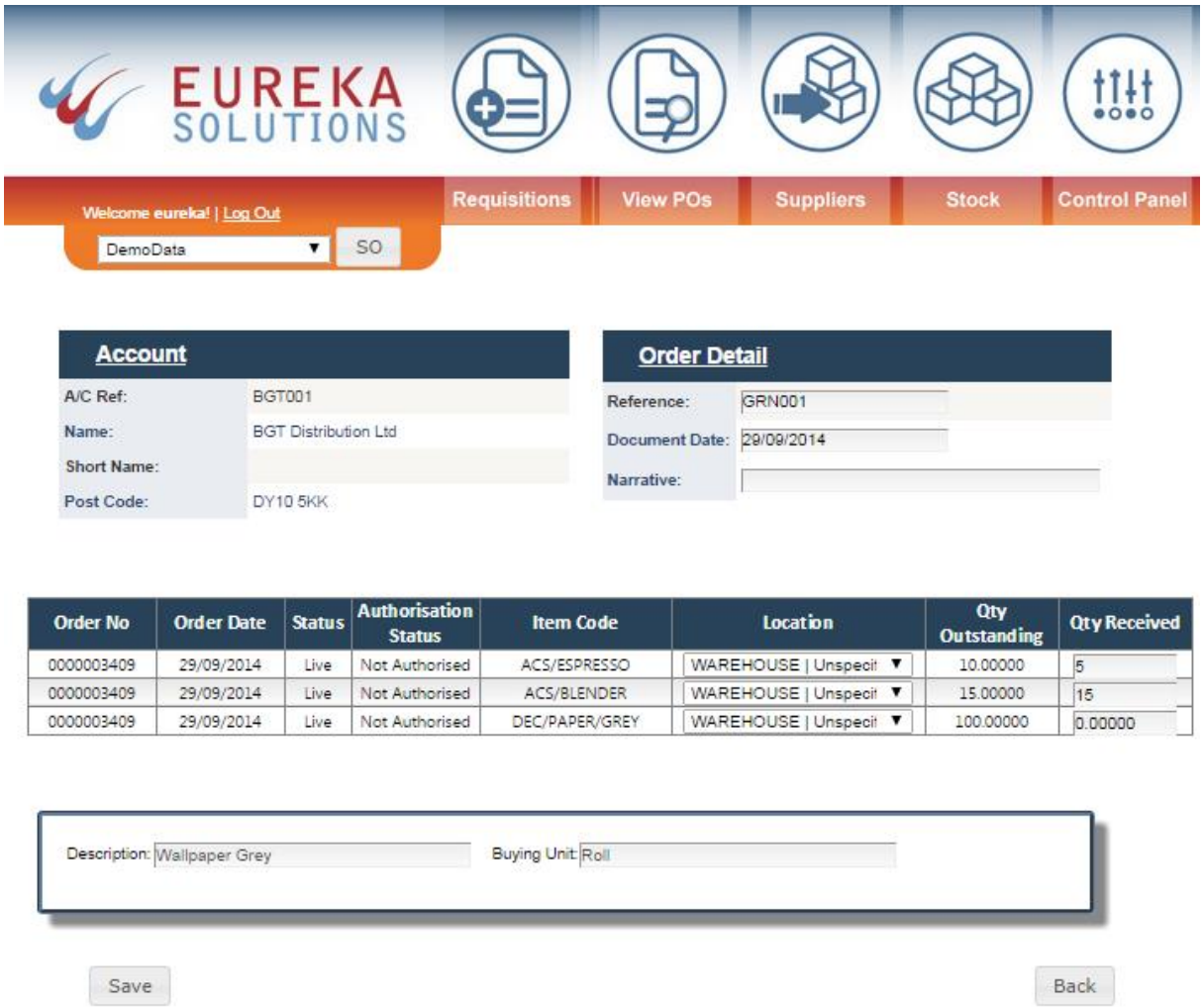
Receive Goods against Purchase Orders

From within the Web PO Requisition for Sage 200, users can also record goods received against an existing purchase order, assuming their user has been given permission to do this through the Control Panel.

When viewing an existing PO through the web interface, there will be a new button at the bottom of the PO labelled **Confirm Goods Received**.


EUREKA SOLUTIONS
Requisitions
View POs
Suppliers
Stock
Control Panel
Welcome eureka! | Log Out
DemoData
SO
Account
A/C Ref: ABC001
Name: AB Cookers
Post Code: BL1 1FT
Warehouse: HOME
Created By: DEV
Originated by: eureka
Status: Live
Order Detail
Document No: 0000003401
Document Date: 23/09/2014
Requested Date: 23/09/2014
Authorisation String: Not required
Order Lines
Line Number | Line Type | Code | Description | Warehouse | Qty | Price | Net | Vat | Gross
1 | Standard | 123Toaster | 123Toaster | HOME | 10.99999 | 1.00000 | 9.90 | 1.98 | 11.88
2 | Free Text | | This is a free text line | | 10.00000 | 4.00000 | 36.00 | 7.20 | 43.20
3 | Charge | Delivery | Delivery | | 1 | 2.00000 | 2.00 | 0.40 | 2.40
Total Net 47.90
Total Tax 9.58
Total Gross 57.48
Print to PDF
Confirm Goods Received
Back
Eureka Solutions Web System | powered by Eureka Addons
T: 01355 581 960
E: development@eurekasolutions.co.uk

When the user clicks on **Confirm Goods Received** a new window will open to allow them to enter the details of what goods have been delivered.


EUREKA SOLUTIONS
Welcome eureka! | Log Out
DemoData
SO
Requisitions
View POs
Suppliers
Stock
Control Panel
Account
A/C Ref: BGT001
Name: BGT Distribution Ltd
Short Name:
Post Code: DY10 5KK
Order Detail
Reference: GRN001
Document Date: 29/09/2014
Narrative:
Order No | Order Date | Status | Authorisation Status | Item Code | Location | Qty Outstanding | Qty Received
0000003409 | 29/09/2014 | Live | Not Authorised | ACS/ESPRESSO | WAREHOUSE | Unspecif | 10.00000 | 5
0000003409 | 29/09/2014 | Live | Not Authorised | ACS/BLENDER | WAREHOUSE | Unspecif | 15.00000 | 15
0000003409 | 29/09/2014 | Live | Not Authorised | DEC/PAPER/GREY | WAREHOUSE | Unspecif | 100.00000 | 0.00000
Description: Wallpaper Grey
Buying Unit: Roll
Save
Back

Users can enter a **Reference**, **Date** and **Narrative** for the Goods Received as per standard Sage 200 functionality. Enter the quantity received for each item line in the **Qty Received** column as required and click on **Save**. Users can part receive orders if appropriate.

When this screen is saved the stock quantities in Sage 200 will be automatically updated to reflect the quantities that have been received into stock.

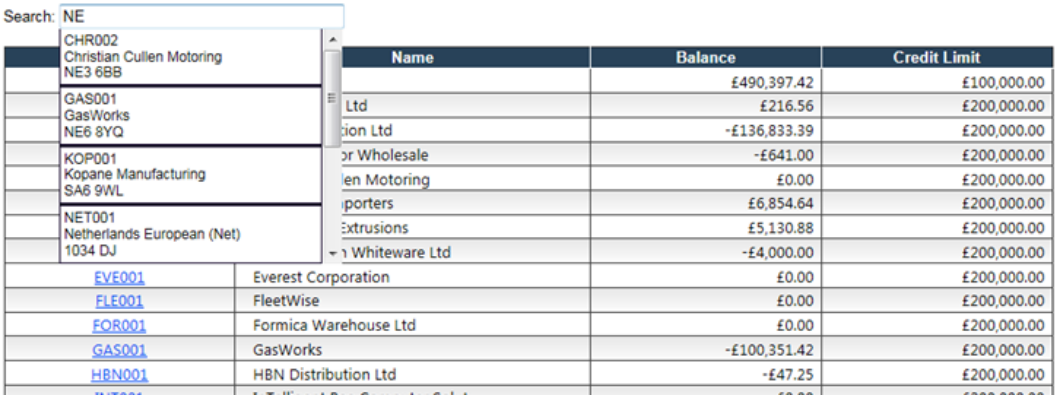
View Supplier Information

You can view existing supplier records from within the web interface by clicking on the **Suppliers** icon in the top left hand corner of the site and a list of suppliers from Sage 200 will be displayed.

Reference	Name	Balance	Credit Limit
ABC001	AB Cookers	£490,397.42	£100,000.00
ATL001	Atlas Ranges Ltd	£216.56	£200,000.00
BGT001	BGT Distribution Ltd	-£136,833.39	£200,000.00
CHR001	Chrome Decor Wholesale	-£641.00	£200,000.00
CHR002	Christian Cullen Motoring	£0.00	£200,000.00
DIR001	Direct Tile Importers	£6,854.64	£200,000.00
DON001	Donaldsons Extrusions	£5,130.88	£200,000.00
ERN001	Ernie Swinton Whiteware Ltd	-£4,000.00	£200,000.00
EVE001	Everest Corporation	£0.00	£200,000.00
FLE001	FleetWise	£0.00	£200,000.00
FOR001	Formica Warehouse Ltd	£0.00	£200,000.00
GAS001	GasWorks	-£100,351.42	£200,000.00
HBN001	HBN Distribution Ltd	-£47.25	£200,000.00
INT001	InTelligent Bee Computer Solut	£0.00	£200,000.00
JOH001	John Almond Manufacturing Ltd	£547.53	£200,000.00
JOH002	Johns Imports Ltd	£29,328.41	£200,000.00
JOH003	John Henderson Insurance	£0.00	£200,000.00
KEN001	Kenway Ltd	£536.92	£20,000.00
KIT001	Kitchen Builders	£0.00	£20,000.00
KIT002	Kitchen Style Co	£4,200.31	£20,000.00

1 2 3

You can also search for a particular supplier account using our powerful search facility by typing the supplier account reference, supplier name or postcode into the **Search** field.



This search is further supplemented by three more specific searches; **Postcode, Name** and **Reference** searches.

You can then select a supplier account by clicking on the blue hyperlink in the **Reference** column to view the corresponding supplier details.

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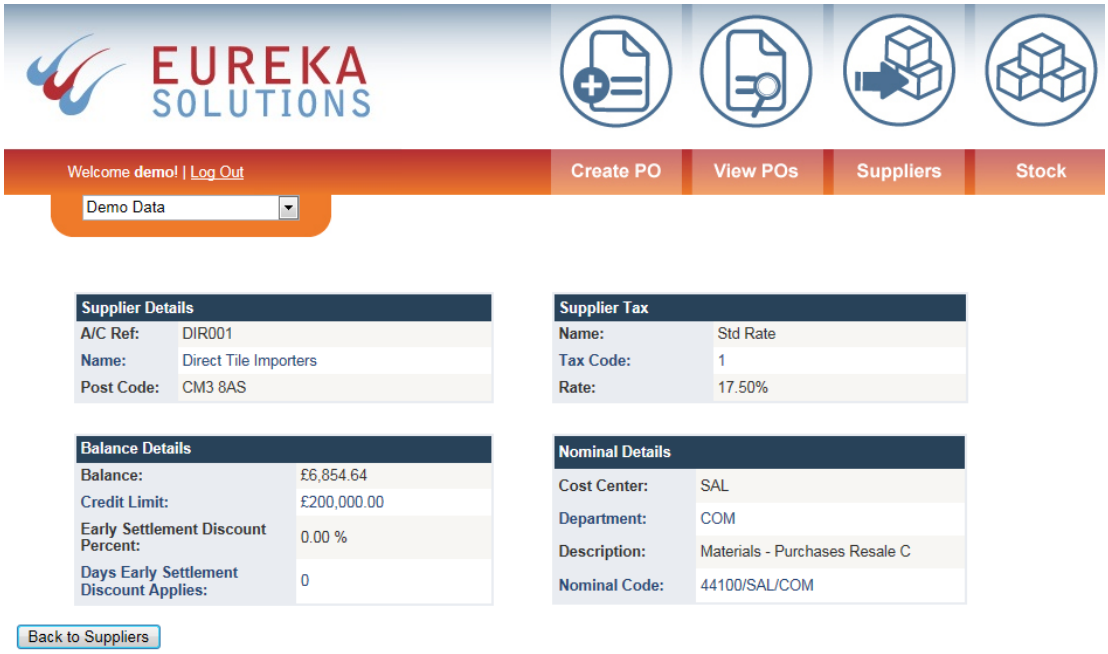
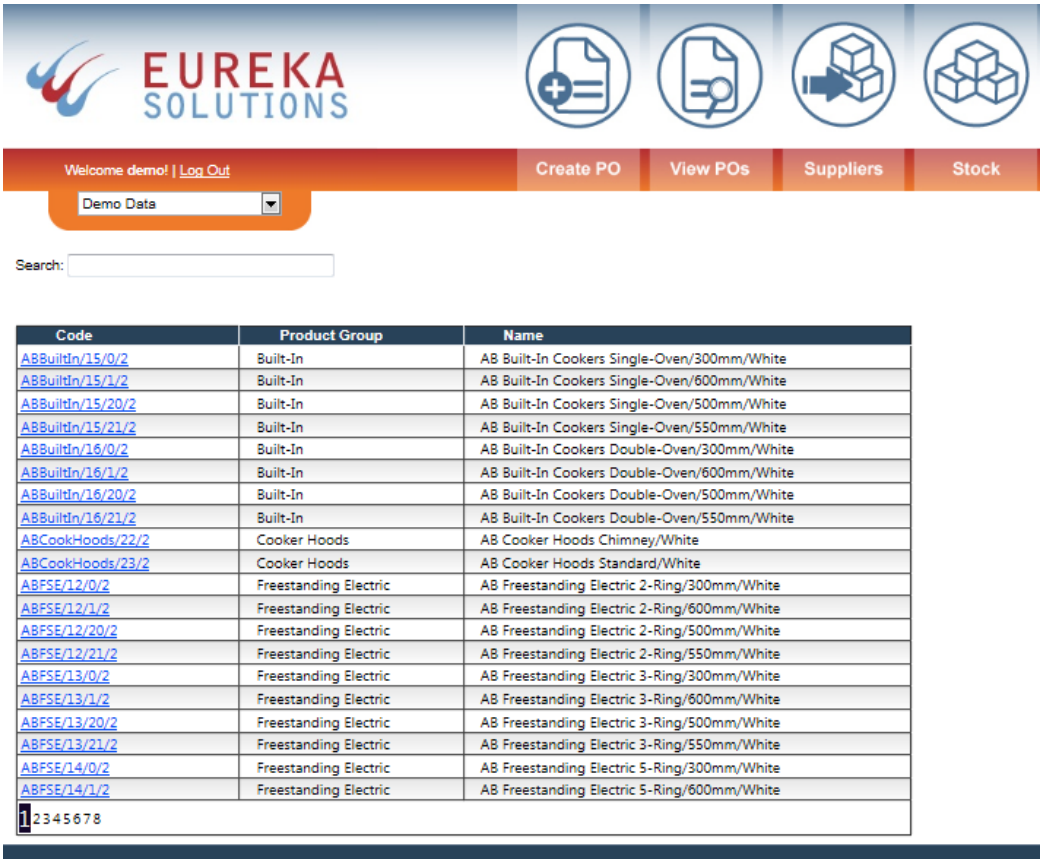


Click **Back to Suppliers** to return to the supplier list.

View Stock Details and Balances

You can also view stock details and check free stock levels through the web interface. Click on the **Stock** icon in the top right hand corner of the site and a list of stock items will be displayed.



Code	Product Group	Name
ABBuiltIn/15/0/2	Built-In	AB Built-In Cookers Single-Oven/300mm/White
ABBuiltIn/15/1/2	Built-In	AB Built-In Cookers Single-Oven/600mm/White
ABBuiltIn/15/20/2	Built-In	AB Built-In Cookers Single-Oven/500mm/White
ABBuiltIn/15/21/2	Built-In	AB Built-In Cookers Single-Oven/550mm/White
ABBuiltIn/16/0/2	Built-In	AB Built-In Cookers Double-Oven/300mm/White
ABBuiltIn/16/1/2	Built-In	AB Built-In Cookers Double-Oven/600mm/White
ABBuiltIn/16/20/2	Built-In	AB Built-In Cookers Double-Oven/500mm/White
ABBuiltIn/16/21/2	Built-In	AB Built-In Cookers Double-Oven/550mm/White
ABCookHoods/22/2	Cooker Hoods	AB Cooker Hoods Chimney/White
ABCookHoods/23/2	Cooker Hoods	AB Cooker Hoods Standard/White
ABFSE/12/0/2	Freestanding Electric	AB Freestanding Electric 2-Ring/300mm/White
ABFSE/12/1/2	Freestanding Electric	AB Freestanding Electric 2-Ring/600mm/White
ABFSE/12/20/2	Freestanding Electric	AB Freestanding Electric 2-Ring/500mm/White
ABFSE/12/21/2	Freestanding Electric	AB Freestanding Electric 2-Ring/550mm/White
ABFSE/13/0/2	Freestanding Electric	AB Freestanding Electric 3-Ring/300mm/White
ABFSE/13/1/2	Freestanding Electric	AB Freestanding Electric 3-Ring/600mm/White
ABFSE/13/20/2	Freestanding Electric	AB Freestanding Electric 3-Ring/500mm/White
ABFSE/13/21/2	Freestanding Electric	AB Freestanding Electric 3-Ring/550mm/White
ABFSE/14/0/2	Freestanding Electric	AB Freestanding Electric 5-Ring/300mm/White
ABFSE/14/1/2	Freestanding Electric	AB Freestanding Electric 5-Ring/600mm/White

1 2 3 4 5 6 7 8

You can also search for a particular stock item by typing part of either the stock item code or stock item name into the **Search** field.

Code	Product Group	Name
ABBuiltIn/15/0/2	Built-In	AB Built-In Cookers Single-Oven/300mm/White
ABBuiltIn/15/1/2	Built-In	AB Built-In Cookers Single-Oven/600mm/White
ABBuiltIn/15/20/2	Built-In	AB Built-In Cookers Single-Oven/500mm/White
ABBuiltIn/15/21/2	Built-In	AB Built-In Cookers Single-Oven/550mm/White
ABBuiltIn/16/0/2	Built-In	AB Built-In Cookers Double-Oven/300mm/White
ABBuiltIn/16/1/2	Built-In	AB Built-In Cookers Double-Oven/600mm/White
ABBuiltIn/16/20/2	Built-In	AB Built-In Cookers Double-Oven/500mm/White
ABBuiltIn/16/21/2	Built-In	AB Built-In Cookers Double-Oven/550mm/White
ABCookHoods/22/2	Cooker Hoods	AB Cooker Hoods Chimney/White
ABCookHoods/23/2	Cooker Hoods	AB Cooker Hoods Standard/White
COOK/CERM/HOB	Cookers - Ovens	Ceramic 4 Plate Hob
COOK/DOUBLE OVEN	Cookers - Ovens	Built under gas cooker double oven
COOK/ELECTRIC/HOB	Cookers - Ovens	4 RING ELECTRIC HOB
COOK/EXTRACTOR/HOOD	Cookers - Ovens	EXTRACTOR HOOD
COOK/FAN-OVEN	Cookers - Ovens	Built In Fan Oven

This search is further supplemented by three more specific searches; **Product Group, Stock Code** and **Stock Name** search.

Click on the blue hyperlink in the **Code** column to view the corresponding stock item details and the free stock quantity available at each warehouse.

Stock Detail

Stock Code:	ABBuiltIn/15/0/2
Name:	AB Built-In Cookers Single-Oven/300mm/White
Free Stock:	45.00000

Stock Tax Detail

Tax Type:	Std Rate
Tax Rate:	17.50
Tax Code:	1

Nominal Details

Description:	Stocks - Finished Goods
Cost Center:	
Department:	
Nominal Code:	13101

Stock Warehouse Details:

Warehouse Name:	Warehouse Description:	Free Stock:
Newcastle	Newcastle Store	21.00000
WAREHOUSE	Warehouse	24.00000

Back

Click on the **Back** button to return to the stock item list.

Reporting on Purchase Requisitions from Sage 200

All of the purchase requisition details entered via the web interface will be stored in new tables within the Sage 200 database, therefore will be available for you to use when creating new reports or amending existing reports using the standard Sage 200 Report Designer from within Sage 200.

To access the data from the Purchase Requisitions table using the Sage 200 Report Designer you may need to add the following tables to your reports, depending on your specific reporting requirements:

- MMS354AnalysisSetting
- MMS354Attachments
- MMS354CompanySettings
- MMS354Department
- MMS354DepartmentNomAcc
- MMS354EmailSetting
- MMS354GlobalSettings
- MMS354Originators
- MMS354POReqOrderReturn

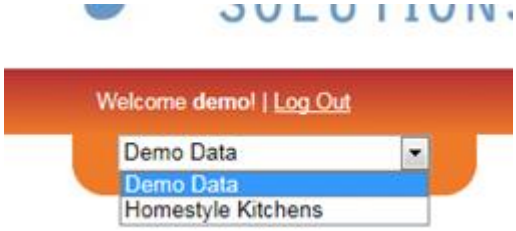
- MMS354POReqOrderReturnLine
- MMS354ProjectList
- MMS354ReqNumber
- MMS354RequisitionApproval
- MMS354UserDepartments
- MMS354UserPermissions

Your Sage 200 Business Partner may also be able to assist with reporting on purchase requisitions using the Sage 200 Report Designer if you require assistance with this.

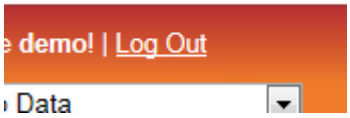
Switching between Sage 200 Companies

The module allows users to switch easily between Sage 200 company databases, depending on the companies that the user has been given access to through the Sage 200 System Administrator.

To switch Sage 200 companies simply select the company that you want to access from the dropdown list of available companies in the top left hand corner below the logo.



Logging Out of Web PO Requisition



To log out of the system, click on the **Log Out** link under the company logo in the top left hand corner of the website.

Contact Us

Eureka Solutions have worked successfully with many Sage 200 customers over the past 10 years. In addition to Web PO Requisition for Sage 200 and our other modules that we have written for Sage 200, we are also happy to engage in bespoke/customisation work to help tailor your Sage 200 system to meet your specific business requirements.

We offer free trials of our Web PO for Requisition for Sage 200 module on our demo site www.eurekashowcase.co.uk. For up to date information and details of all our addon modules for Sage 200, please refer to our website www.eurekaaddons.co.uk. Our bestselling addon modules include:

Our **Sales Order Plus** module has been specifically designed to provide fast order entry from within Sage 200 and aims to ensure that all information required by users entering orders is easily available from the main order entry screen. Sales Orders Plus has been really successful in telesales and tradecounter environments where fast order entry and access to sales history information is vital.

Data Exchange for Sage 200 is ideal for two-way integration between Sage 200 and 3rd party systems, for example websites, CRM and manufacturing systems. Data Exchange allows for the transfer of information such as customer and supplier details, sales and purchase orders, stock records and stock levels, and Cash Book transactions in either CSV or XML file formats.

Our **Plus Pack** is a collection of over 70 individual addons for Sage 200, most of which were created as a result of customer requests. The addons included in the pack range from simple sales order entry enhancements to some serious improvements to core Sage 200 functionality.

If you wish to discuss a specific project or pricing or would like further information on Web PO Requisition for Sage 200 or any of our Sage 200 addon modules then please call our head office on 01355 581 960 or e-mail us at development@eurekasolutions.co.uk.